

Athene® BCA® Honored with “Best FIA of the Year” Award at SPi USA 2022 Conference

Industry-leading Indices Available with Athene® BCA® Result in Award

Scottsdale, AZ - Nov. 28, 2022 – (BUSINESS WIRE) – Annexus, a leading retirement product design company, announced that Athene BCA 2.0 Suite of Fixed Indexed Annuities (FIAs), one of its flagship FIAs, won the “FIA of the Year” award at the SPi USA 2022 “Awards for Excellence” ceremony. The event, hosted by Structured Product Intelligence (SPi), recognizes leaders in structured investments in the indexed product space, including insurance carriers, annuity and index designers, and hedge providers. This is the second FIA of the Year award for BCA in 2022.

“It’s great to see BCA being recognized by the industry for a second time as FIA of the Year,” said Annexus CEO and Co-Founder Ron Shurts. “It’s a testament to the work our teams have done to bring some of the brightest academic minds and Wall Street together to create a really powerful lineup of indices available with BCA fixed indexed annuities.”

Annexus partnered with Athene, a leading provider of retirement savings products, and leading index designers, including Professor Robert Shiller, legendary Wharton Professor Jeremy Siegel, Bank of America, Barclays, Citi, Merrill Lynch, S&P and WisdomTree to build one of the industry’s most diversified index lineups in an FIA designed to help provide more stable returns through changing market environments.

“Once again, I am delighted that our Shiller Barclays Global index is part of this two-time award-winning FIA for 2022. The Annexus strategy is taking the principle of diversification seriously, to the point of putting together for consumers a broad array of thoughtfully defined indices,” said Professor Shiller.

The Athene BCA Suite of Fixed Indexed Annuities offers one of the industry’s strongest combinations of accumulation potential, principal protection, income, and legacy benefits. It features two of the top-producing indices, the WisdomTree Siegel Strategic Value Index™ and the Shiller Barclays Global Index, which both have positive year-to-date performance of up to [10%], while the S&P 500 is down [-24%] and bonds down over [-13%].

“I am pleased the WisdomTree Siegel Strategic Value Index has performed so well,” said Professor Siegel. “The index design was heavily inspired by my research and value approach to investing. It is based upon a systematic value investment strategy, which is an approach that has worked well over long periods.”

“In this economic downturn, the WisdomTree Siegel Index favors sectors that have strong earnings and momentum relative to their current price and avoids those sectors that are expensive relative to their fundamental,” said Professor Siegel. “A unique design of our index, which has worked extremely well, is that it shorts the S&P 500® Index while going long in sectors which have strong value characteristics.”

The Athene BCA 2.0 also exclusively offers the Citi Grandmaster Index, which won the “Best New Index” award at SPi USA 2022. The index is broadly diversified across global equities, government bonds, commodities, and corporate credit. The index uses forecasting and a dynamic optimization process with the aim to adapt through various market cycles.

In a recent study from Cannex of financial professionals, one-third of financial professionals are more likely to recommend an annuity, and an additional 59 percent are equally as likely, due to the current climate of rising interest rates, inflation, and growing anxiety.¹

“BCA fixed indexed annuities has demonstrated its ability to be an attractive alternative to help reduce overall portfolio risk while still crediting interest including this year,” said Tom Haines, Executive Vice President of Index Solutions and Capital Markets at Annexus. “Athene BCA currently offers the most robust portfolio of leading indices in the FIA market.”

¹ Source: Ali Cannex Protected Retirement Income and Planning Study, July 2022.

About Annexus

Annexus designs solutions to help Americans grow and protect their retirement savings. For over a decade, Annexus has developed market-leading fixed indexed annuities and indexed universal life insurance products. In close collaboration with design partner Genesis Financial, Annexus has forged relationships with many of the industry’s leading insurance carriers and the world’s largest investment banks. Find out more about Annexus and its products at www.annexus.com.

About Robert Shiller

Shiller is an American economist, best-selling author and Sterling Professor of Economics, Professor of Finance and Fellow at the International Centre for Finance at Yale University. Professor Shiller is ranked among the 100 most influential economists in the world.

About Jeremy Siegel

Siegel is the Russell E. Palmer Professor of Finance at the Wharton School of the University of Pennsylvania. Siegel received his Ph.D. from M.I.T. and has written and lectured extensively about the economy and financial markets, monetary policy and interest rates and stock and bond returns. Along with heading the macroeconomics module of the Morgan Bank Finance Program in New York, he is the academic director of the U.S. Securities Industry Institute and is on the Advisory Board of the Asian Securities Industry Association.

About Athene

Athene, through its subsidiaries, is a leading retirement services company with total assets of \$236.7 billion as of September 30, 2022, and operations in the United States, Bermuda, and Canada. Athene specializes in helping its customers achieve financial security and is a solutions provider to institutions. Founded in 2009, Athene is Driven to Do More for our policyholders, business partners, shareholders, and the communities in which we work and live. For more information, please visit www.athene.com.

About Structured Product Intelligence (SPI)

SPi is a part of WSD group, a market intelligence company that provides market intelligence, reference data and lifecycle information for the structured products industry. London, England-based SPi offers services that enable access to a large volume of customer reports, which allows individuals to have an in-depth understanding of the market, including volumes, trends, league tables and data-driven research. SPi stores detailed information for every single structured product sold in the U.S. market. SPi covers all data points from distribution to dates, and from volumes to life-cycle management, including coupons and observations.

Athene Annuity and Life Company (61689), headquartered in West Des Moines, Iowa, and issuing annuities in 49 states (excluding NY) and D.C., and Athene Annuity & Life Assurance Company of New York (68039), headquartered in Pearl River, NY, and issuing annuities in New York, are not undertaking to provide investment advice for any individual or in any individual situation, and therefore nothing in this should be read as investment advice.

The Athene BCA 2.0 ANN19 (01/19), ANN19CS06 (01/19), ANN19CS08 (01/19), ANN19CS10 (01/19), ANN19CS12 (01/19) or state variation, the Family Endowment Rider PBEDB (01/19), PBEDBRS (01/19) or state variation, and the Balanced Allocation Lifetime Income Rider ANNIRS

(01/19), ANNIRSRS (01/19), ANNIRF (01/19), ANNIRFRS (01/19) or state variation are issued by Athene Annuity and Life Company, West Des Moines, IA. Product features, limitations and availability vary; see Certificate of Disclosure for full details. Products not available in all states.

ATHENE ANNUITES ARE PRODUCTS OF THE INSURANCE INDUSTRY AND NOT GUARANTEED BY ANY BANK NOR INSURED BY FDIC OR NCUA/NCUSIF. MAY LOSE VALUE. NO BANK/CREDIT UNION GUARANTEE. NOT A DEPOSIT. NOT INSURED BY ANY FEDERAL GOVERNMENT AGENCY. MAY ONLY BE OFFERED BY A LICENSED INSURANCE AGENT.

© 2022 Annexus

BCA® is a registered trademark of Annexus. All rights reserved.