

FOR IMMEDIATE RELEASE

Jefferson National Contact:

Deborah Newman
Director Corporate Communications
212-220-5862
dnewman@jeffnat.com

Jefferson National Launches New "TPIA Marketplace" for Fee-Based Advisors Demanding Strategies to Tackle Today's Tough Market

Innovator of First Flat-Insurance Fee VA Teams with Recognized Third Party Investment Advisors (TPIAs) to Provide Diversification, Superior Value and Tax-Efficient Solutions

New York, NY and Louisville, KY - September 14, 2010 - Financial advisors are still grappling with the fallout of the 2008 crash and seeking new solutions to manage today's volatile market. Now [Jefferson National](#), innovator of the industry's [first flat-insurance fee variable annuity](#), has met this demand with the launch of an all-new online marketplace to provide fee-based and fee-only advisors with access to a range of proven asset management strategies from a select group of recognized Third-Party Investment Advisors (TPIAs). This "[TPIA Marketplace](#)" is the latest innovative resource for the fee-based and fee-only advisors who have come to trust Jefferson National's unique approach to creating greater value and tax-efficient solutions.¹

"At Jefferson National, we've vetted and assembled a team of top-tier third-party managers on our new TPIA Marketplace to help fee-based and fee-only advisors build their own virtual portfolio management department—without the expense of extra staff or added infrastructure," said [Laurence Greenberg, President of Jefferson National](#). "By combining a diverse range of proven management strategies with the power of Jefferson National's low-cost, tax-deferred retirement vehicle, advisors have the resources they demand to give their clients' portfolios an edge in today's tough market."

In a survey conducted by Jefferson National earlier this year, a clear majority of the advisors polled—roughly 2 to 1—believed that changing their asset management strategy was key to navigating the current market. Jefferson National's new TPIA Marketplace provides an efficient, effective and transparent solution. Available for financial professional only on Jefferson National's password-protected Advisor Site, the TPIA Marketplace is a one-stop destination that delivers a suite of due diligence essentials on each TPIA firm, including strategic overviews, portfolio construction, historical performance, important disclosures and an interactive email request form.

For the initial launch of the TPIA Marketplace, six recognized firms with proven track records will be offering their management services to advisors using Jefferson National's Flat-Insurance Fee VA:

[Capital Allocation & Management](#): A program offered by Bellatore Financial, Inc., providing an innovative alternative to buy and hold. Guided by some of the most recognized and esteemed names in the fields of finance and economics including Nobel-Laureate Dr. Harry Markowitz, behavioral finance expert Dr. Meir Statman and risk management expert Dr. Sanjiv Das. "To truly take advantage of the opportunities presented by the markets, we believe it is important to combine the benefits of strategic asset allocation, with a tactical overlay," said Kane Cotton, CFA, Chief Investment Strategist, Capital Allocation & Management.

[CMG Capital Management Group, Inc.](#): An SEC-Registered Investment Advisor and Alternative investment management specialist offering a number of quantitatively based trading strategies that are non-correlated to the general equity and fixed markets. "With 27 years experience in alternative strategies, we are the authority on active investment management, and can help advisors understand how to blend actively managed strategies together with their passively managed positions to create significantly enhanced portfolio diversification. Our objective is to achieve positive returns in all market environments," says Steve Blumenthal, Founder, President and CEO of CMG Capital Management Group, Inc.

[Denver Money Manager LLC](#): An investment fiduciary, asset manager, and financial educator. Denver Money Manager's Global Multi-Bond Strategic Income is designed to offer investors both offense and defense in the global bond market. "We avoid the conventional wisdom of Wall Street and instead rely on the best available academic information and advice, to provide consistent and competitive investment returns over time," said Robert Grey, Founder and Chief Investment Strategist for Denver Money Manager LLC.

[Purcell Advisory Services, LLC](#): An alternative to buy and hold, Purcell's actively-traded, risk-averse investment programs incorporate both long and inverse mutual funds. "Built on a cornerstone of risk management and capital preservation, we provide alternative long and inverse investment solutions, creating and managing tactical programs that seek to capture opportunities regardless of market direction," said Teri Weigel, CFP®, Principal and Chief Compliance Officer, Purcell Advisory Services, LLC.

[Regatta Research & Money Management, LLC](#): A firm recognized for their active management approach and distinguished in house research. Named by Goldline Research, listed in Forbes as one of the "Top 10 Leading Wealth Managers in the United States," and named four years in a row by Bloomberg as one of America's Top Wealth Management Superstars. "Our goal is to outperform the major market indices through a multi-step process, which includes macro economic, quantitative, fundamental and behavioral finance analysis, where we create a balance between capital appreciation and risk management," said Rudy Blanchard, Managing Partner, Regatta Research & Money Management, LLC.

[Schreiner Capital Management, Inc.](#): An SEC-registered RIA specializing in tactical asset allocation solutions for Advisors and their clients. Schreiner's active management process seeks to consistently position portfolios for protection and growth. "Our investment approach is simple but powerful. We seek to capture most of the stock market's good times, miss most of its bad times, and deliver the results your clients need with a far more comfortable ride than the traditional buy-and-hold approach," said Brian Schreiner, Vice President and head of Advisor Services for Schreiner Capital Management, Inc.

While tactically managed portfolios can produce short term capital gains, minimizing these taxes through the use of a low-cost, no-load variable annuity such as Jefferson National's Flat-Insurance Fee VA can benefit clients by enhancing their portfolio's performance. Research confirms that "tax-inefficient" investments such as REITs, bond funds and actively managed stock funds that generate short-term capital gains and ordinary income, currently taxed as high as 35%, consistently perform better in a low-cost, tax-deferred variable annuity than in a taxable account.²

Jefferson National's Monument Advisor is recognized as the lowest-cost retirement vehicle on the market³ and the number-one RIA-sold VA for three consecutive years according to [Morningstar VARDS](#) Data.⁴ Jefferson National's Monument Advisor offers more than 250 investment options, the industry's largest supermarket of tax-deferred funds and five times more underlying funds than the typical VA.⁵ Jefferson National also offers the industry's most subaccounts with the Five Star and Four Star Morningstar Rating for a second consecutive year.⁶

With a flat-insurance fee of \$20 per month⁷ no matter how much clients invest⁸, Jefferson National's Monument Advisor is uniquely positioned to meet the needs of the rapidly growing market of RIAs and independent fee-based and fee-only advisors. According to [Cerulli Associates](#), the Fee-Based Advisory market is one of the fastest-growing segments in the industry, with assets topping more than \$7.2 Trillion as of 2008⁹, and more than 65% of brokers surveyed said they would be interested in going independent.¹⁰

About Jefferson National Life Insurance Company

[Jefferson National Life Insurance Company](#) offers retirement products for fee-based advisors and the clients they serve. Jefferson National believes that simple, low-cost variable annuities should be considered for a part of every American's retirement portfolio, and we've made it our mission to help all Americans save more for retirement by launching [Monument Advisor](#), the first variable annuity with a flat insurance fee. Jefferson National serves more than 50,000 customers nationwide, and is domiciled in Dallas, Texas with authority in 49 states and the District of Columbia. To reach our advisor support desk, please call 1-866-WHY-FLAT (1-866-949-3528). To learn more, please visit www.jeffnat.com.

¹Jefferson National is not recommending the TPIA(s) above, and is paid a fee to host the TPIA Marketplace. The information regarding each TPIA is submitted by the TPIA.

²"After-Tax Asset Allocation," William Reichenstein, Financial Analysts Journal, Vol. 62, No. 4, pp. 14-19, July/August 2006.

³For a \$25,000 contract, Monument Advisor's \$20 per month insurance fee is lower than 87% of all variable annuity insurance charges. For a \$100,000 contract, the \$20 insurance fee is lower than all variable annuity insurance charges (Morningstar data as of 12/31/08).

⁴Morningstar VARDS data as of 12/31/0, 12/31/08, 12/31/09.

⁵Morningstar data as 12/31/09.

⁶Morningstar data as of 07/15/10.

⁷Jefferson National's Monument Advisor has a \$20 monthly flat insurance fee with no transaction fees on more than 97% of underlying funds. Additional fees ranging from \$19.99-\$49.99 will be assessed for investors wishing to purchase shares of ultra low-cost funds. See the prospectus for details. Like other variable annuities, the customer pays fees of the underlying funds selected plus the fees of any advisor hired.

⁸Contributions in excess of \$10 million are subject to Company approval.

⁹Cerulli "Quantitative Update: Intermediary Markets," 2009.

¹⁰Cerulli "Quantitative Update: Advisor Metrics," 2008.

