



**HIGHLAND**  
CAPITAL BROKERAGE

# The Source

BY HIGHLAND

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Your monthly financial recap — *specialized*  
and directly from the source.

January 2026

*Introducing*

# The Source

BY HIGHLAND



Welcome to our new digital resource that delivers all the latest news and trends in the finance industry each month.

In every issue, you'll find:

- **A cover story:** A deep dive into a financial topic of interest.
- **Three feature articles:** Breaking down the latest in Life Insurance, Annuities, Long-Term Care, Disability Insurance, Advanced Planning, Underwriting, and our Highland Partners.
- **The Source's Financial District:** Featuring a variety of key insights you can use to elevate your practice.
- A little bit of fun.

It's our priority to make your jobs easier, and we're just getting started. Check us out each month for more, because *The Source by Highland* — delivers.



# Key Person Insurance

## *A breakdown*

With the start of a new year, it's always a good time to reconsider business planning for your clients. Key Person insurance is a great place to start. Beyond protecting a company in the event of the loss of a key employee – it can also be used as a funding vehicle for companies to recover costs associated with various company benefits. This **expansive feature** has all the details you need to know.



Access now

# Highland *Highlights*

LIFE INSURANCE • ANNUITIES • LONG-TERM CARE  
DISABILITY INSURANCE • ADVANCED PLANNING  
UNDERWRITING • HIGHLAND PARTNERS

# #1: Planning Today for Tomorrow

It's a new year, learn how life insurance can help your client's plans. Here is Highland's "Planning Today for Tomorrow." In it, you'll discover how life insurance can be a source of funds for your client's spouse, children, business partners, or other beneficiaries during an extraordinary time of change.



Learn more



# #2: Why a Policy Review?

Speaking of new years, what better time to review your current policies to see if anything needs to be changed.

Check out this vital resource

# #3: I inherited an annuity - now what?

Sticking with our theme, January is also an excellent time to examine how any life changes can affect your planning.



Take a look for more specifics

# The Financial District

*Everything you need to know this month*



## Continuing Education

### The How and Why of Estate Planning

- **Date:** Tues. Feb. 17
- **Time:** 4 p.m. ET
- **Speaker:** Howard Jonas, CLU®, ChFC®, REBC®, CASL®, Vice President, Advanced Planning at Highland

[Register now](#)



## Upcoming Virtual Event

We're hosting a specialized Virtual Event - register today.

### Maximum Efficiency - Time Management and Client Segmentation

- **Date:** Wed. Feb. 11
- **Time:** 12:30 p.m. ET
- **Speaker:** Jared Herzog, Sales Vice President at North American Company

[Register now](#)



## Spotlight: Practice Management

Looking for ways to improve communications? Check out our **Video Email resource**.

[View resource](#)



## Our Case Studies

Actual cases that make a lasting difference. Learn how to mitigate taxes for future generations with this informative case study.

[View resource](#)



## MYGA Rates

View the latest multi-year guaranteed annuity rates.

[View rates](#)



## Helpful Highland Tools

Continuing with our business planning theme, Highland has a useful tool that can start the conversation with your clients. It can also help you determine if your client's company is prepared to handle the sudden passing of an owner. Check out the **Buy-Sell Agreement Scorecard** now.

[View resource](#)



## Quotable

Insight from the experts:

*“Beware of little expenses. A small leak will sink a great ship.”*

— Benjamin Franklin



## Need to Know

Here are some important dates and themes for January.

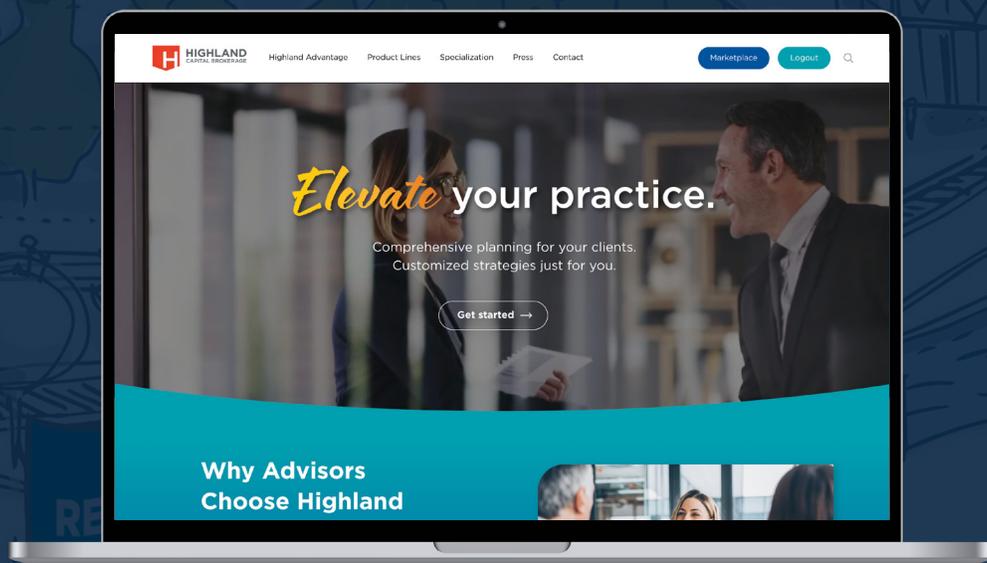
1. National Mentoring Month
2. Financial Wellness Month
3. Tax Identity Theft Awareness Week (Jan. 26-30)
4. Data Privacy Day (Jan. 28)

# Highland's New Sites

*An inside scoop on our upgrades*

We're thrilled to announce Highland has launched our new corporate website and Marketplace platform.

The Highland corporate site delivers a modern, customer-focused experience. And you can now visit it for updated information on our highly specialized teams and several resources available to you and your clients. [View our new site here.](#)



Marketplace is an enhancement and update to our former EasyLife site. Marketplace provides one centralized place for:



**Quotes**



**Applications**



**Educational/support materials for all lines of business.**

[View all the latest changes to Marketplace](#)

Highland remains committed to providing cutting-edge resources and exceptional support for our advisors and clients. These two new sites are just a small part of the big year we have planned – check them out when you have a chance.

Next month:  
In the February edition of *The Source by Highland* –

## *Estate Planning.*

### **For Financial Professional Use Only.**

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