



**2023 LIMRA  
ANNUAL  
CONFERENCE**

Forging the Future

**Adopting Wholesaling  
Strategies for Success in  
the Post-Pandemic Era**

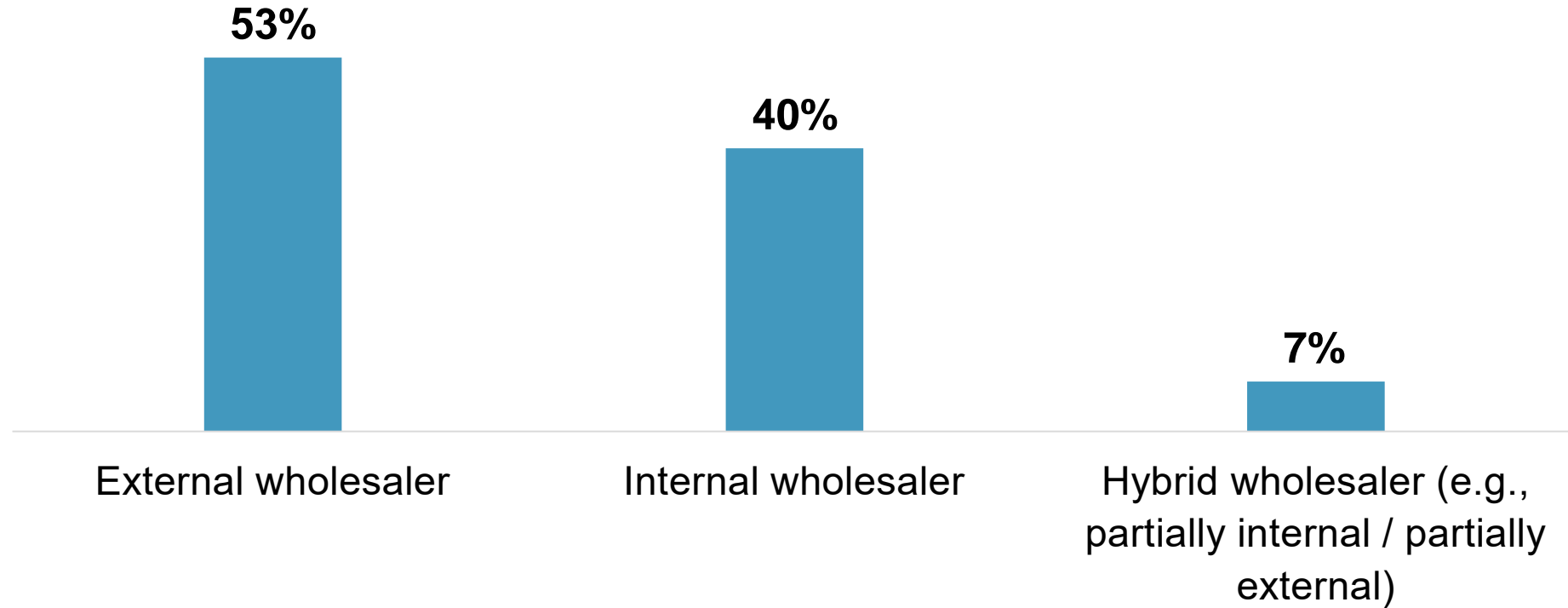


**Chris Callahan**

*Member Relations Director*  
LIMRA and LOMA

# U.S. Wholesaler Study — All Wholesaler Types

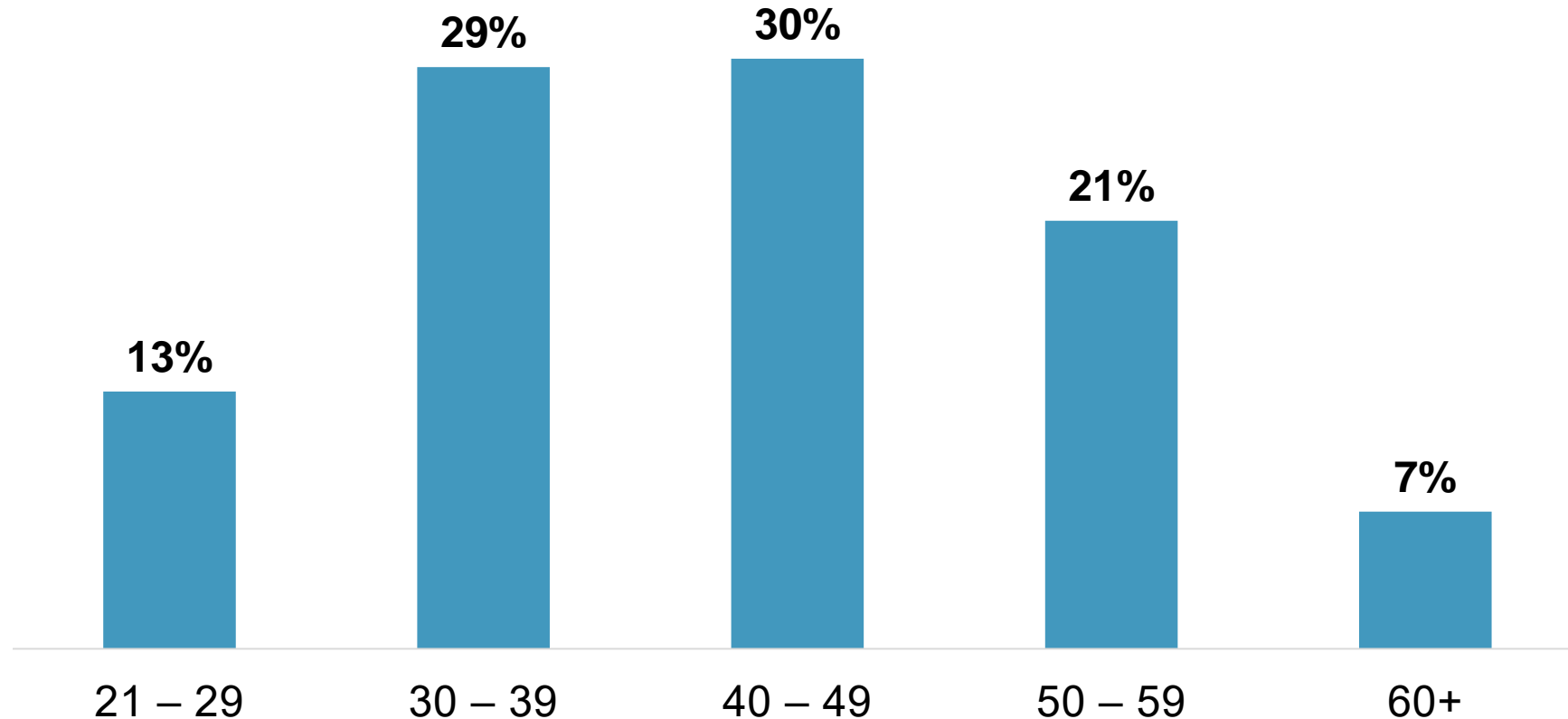
Which of the following best describes your current role?



Source: LIMRA 2023 U.S. Wholesaler Study: Based on 375 external wholesalers, 284 internal wholesalers, 54 hybrid wholesalers. 713 overall respondents, 30 companies.

# U.S. Wholesaler Study — All Wholesaler Types

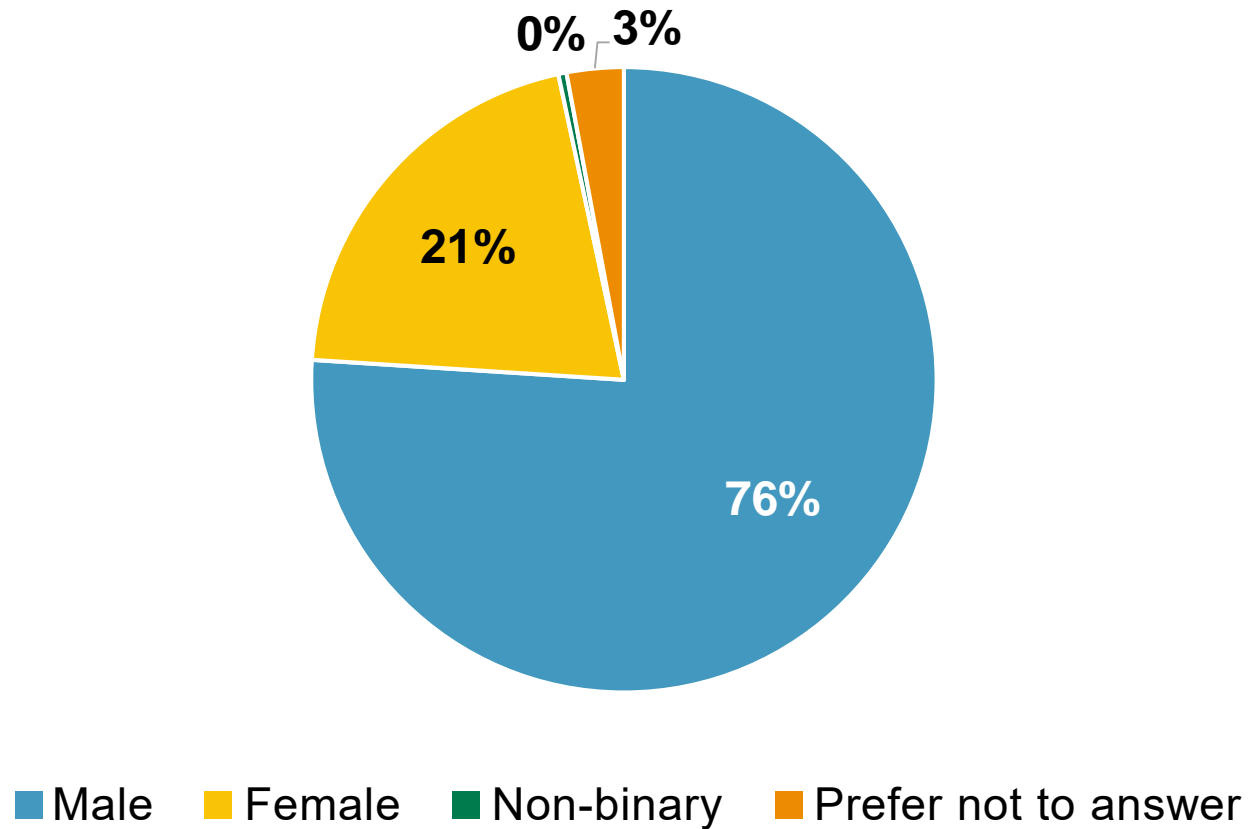
## Wholesaler age bands



Source: LIMRA 2023 U.S. Wholesaler Study: Based on 375 external wholesalers, 284 internal wholesalers, 54 hybrid wholesalers. 713 overall respondents, 30 companies.

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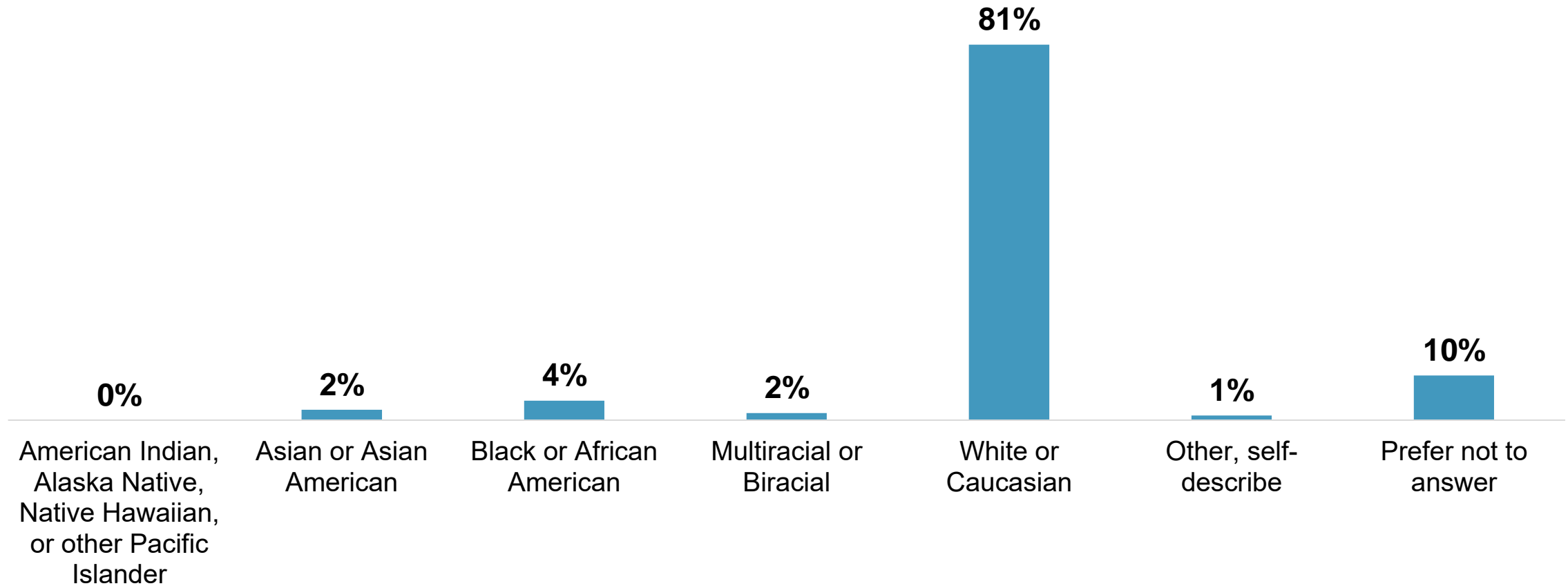
## What is your gender?



Source: LIMRA 2023 U.S. Wholesaler Study: Based on 375 external wholesalers, 284 internal wholesalers, 54 hybrid wholesalers. 713 overall respondents, 30 companies.

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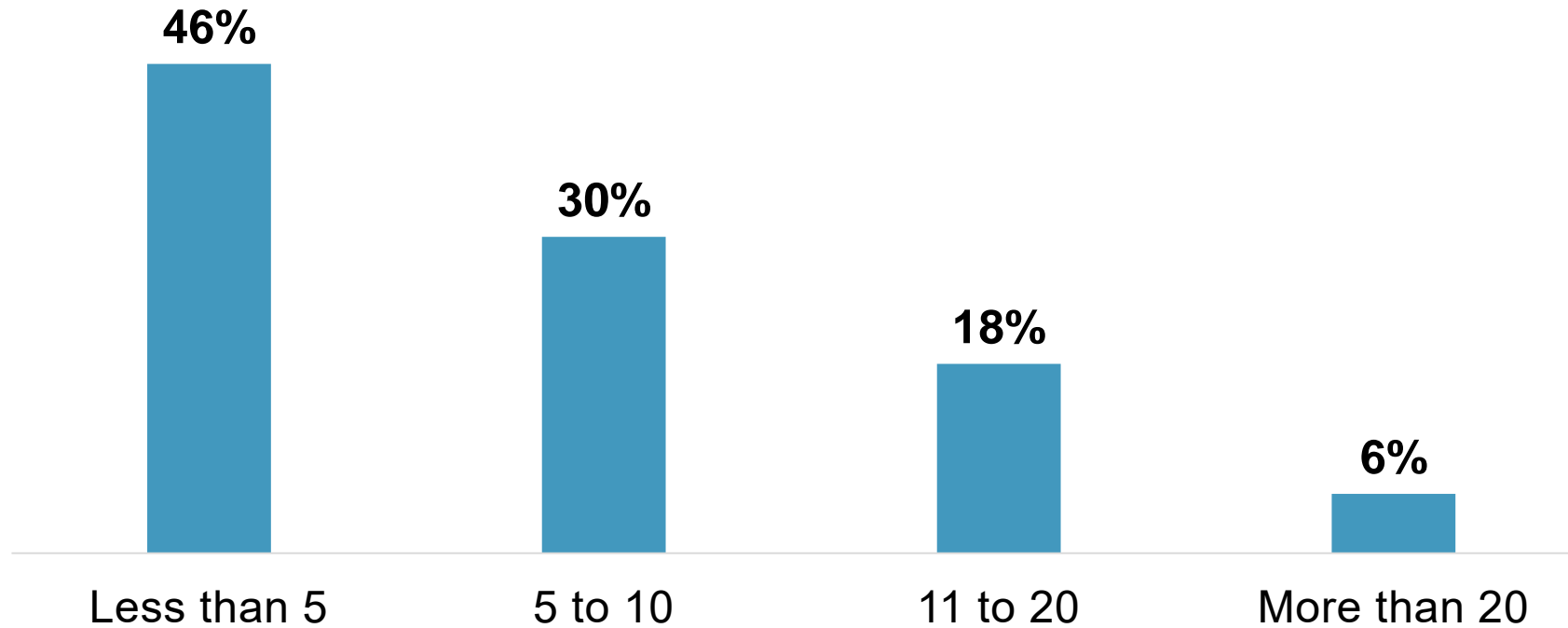
## What is your race or ethnic background?



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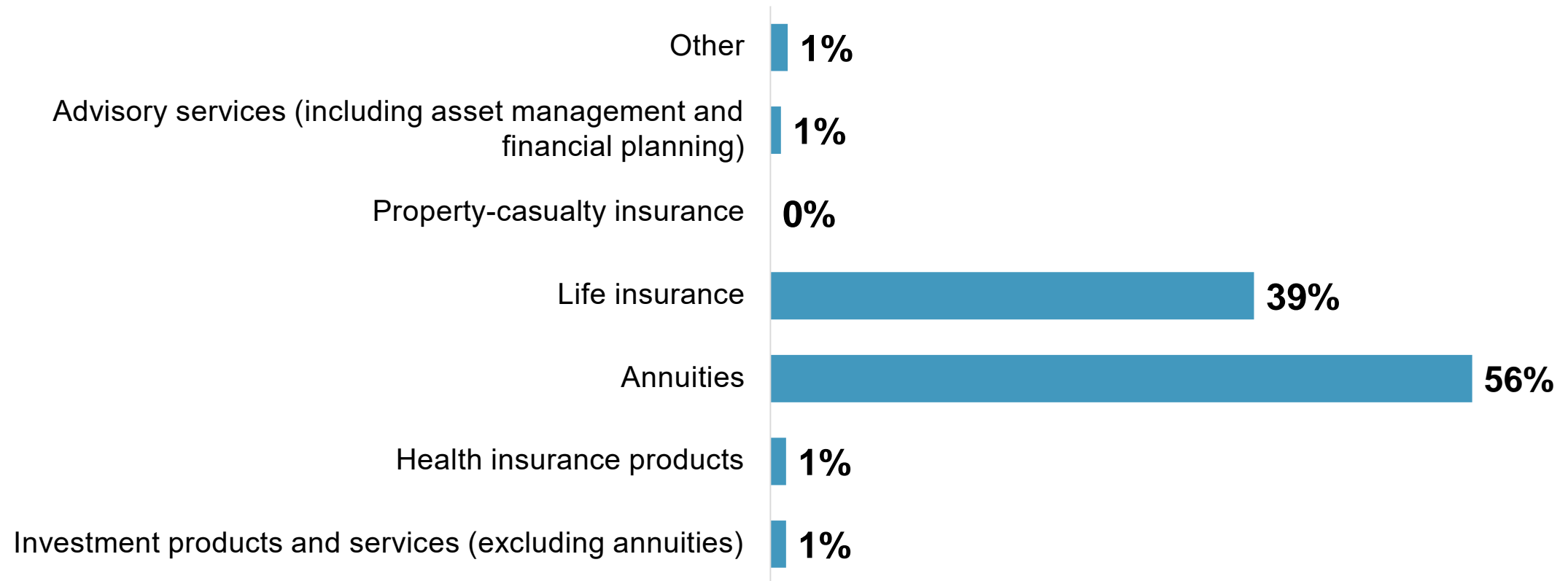
How many years have you been in your current position?



Source: LIMRA 2023 U.S. Wholesaler Study – All wholesaler types.

# U.S. Wholesaler Study — All Wholesaler Types

## Which product do you support/wholesale the most?

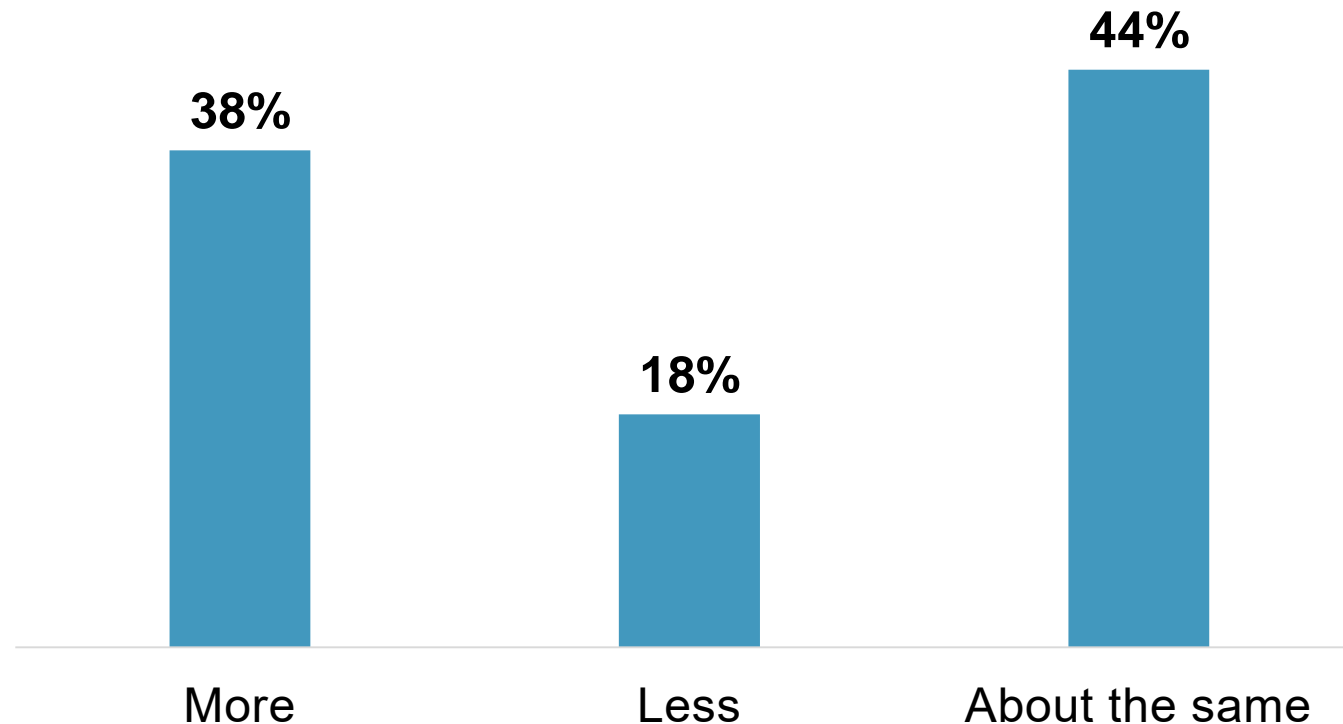


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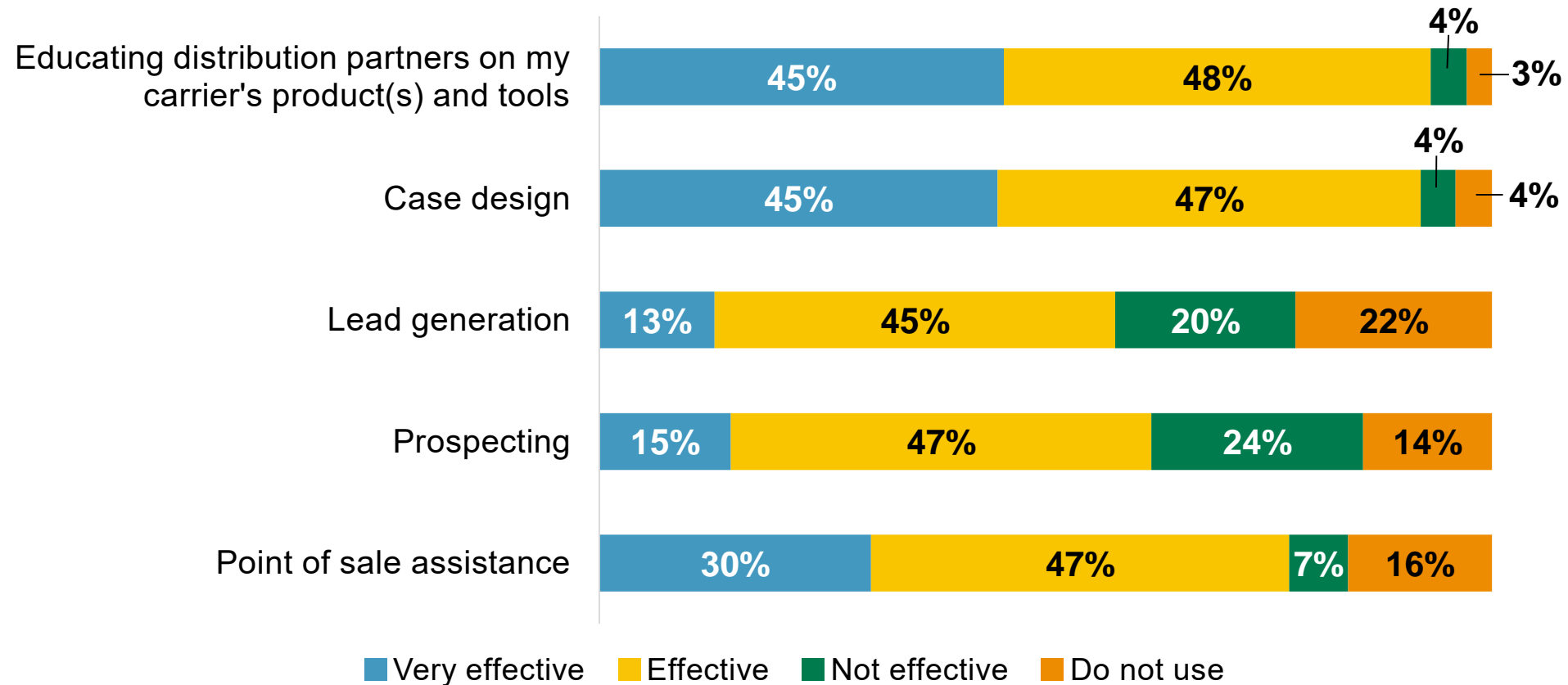
**Overall, are you virtually communicating with financial professionals more, less, or about the same as a year ago?**



Source: LIMRA 2023 U.S. Wholesaler Study: Based on 375 external wholesalers, 284 internal wholesalers, 54 hybrid wholesalers. 713 overall respondents, 30 companies.

# U.S. Wholesaler Study — All Wholesaler Types

Rank the effectiveness of virtual communication for the following activities

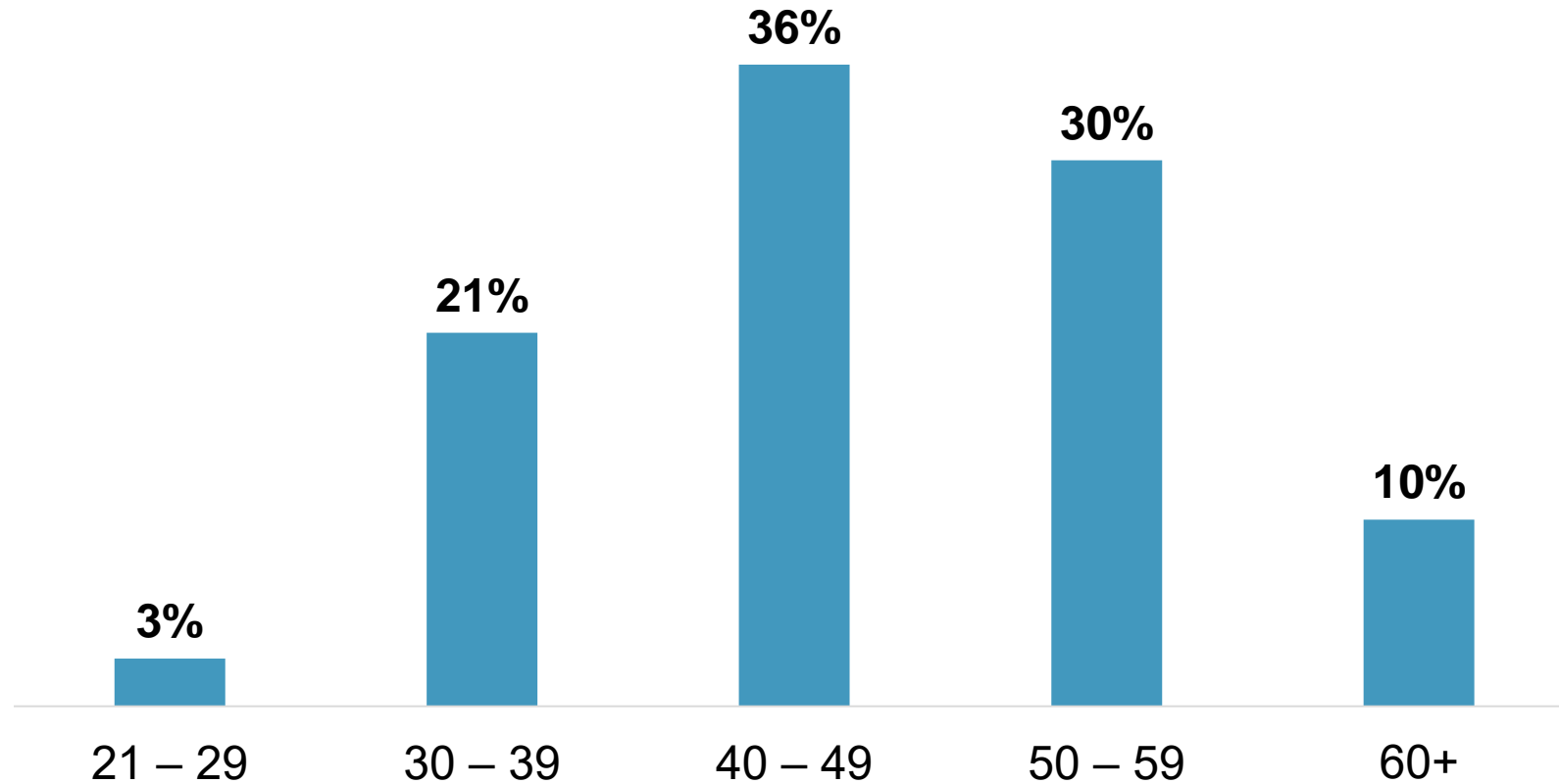


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# 2023 U.S. Wholesaler Study – External Wholesalers

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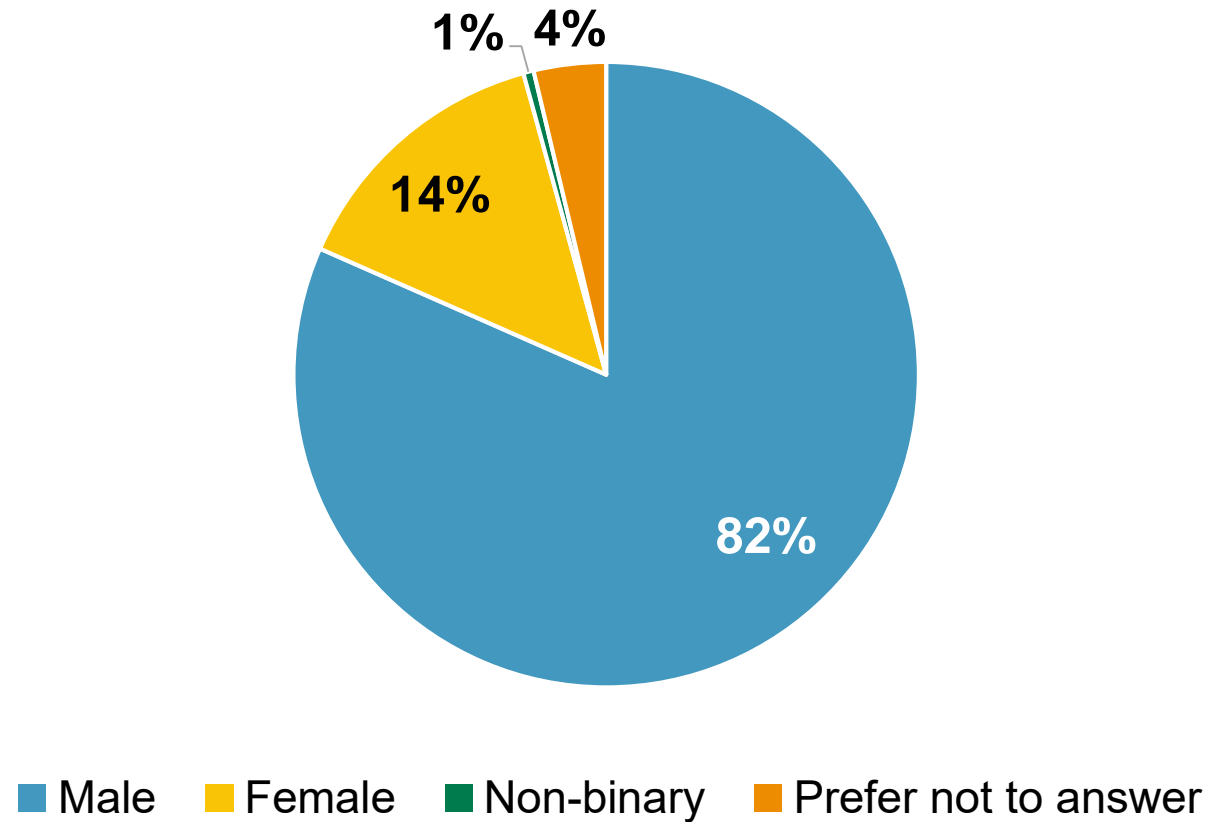
## Wholesaler age bands



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# U.S. Wholesaler Study — External Wholesalers

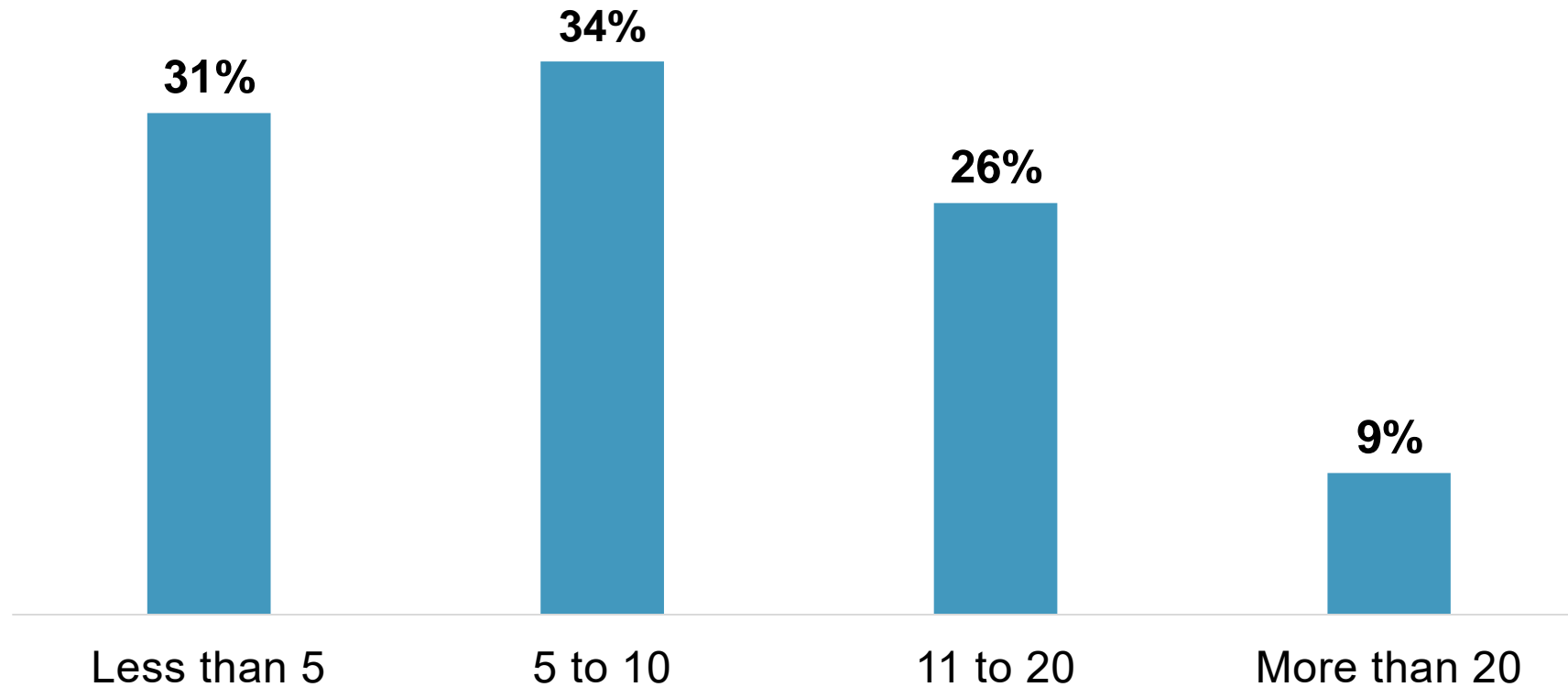
## What is your gender?



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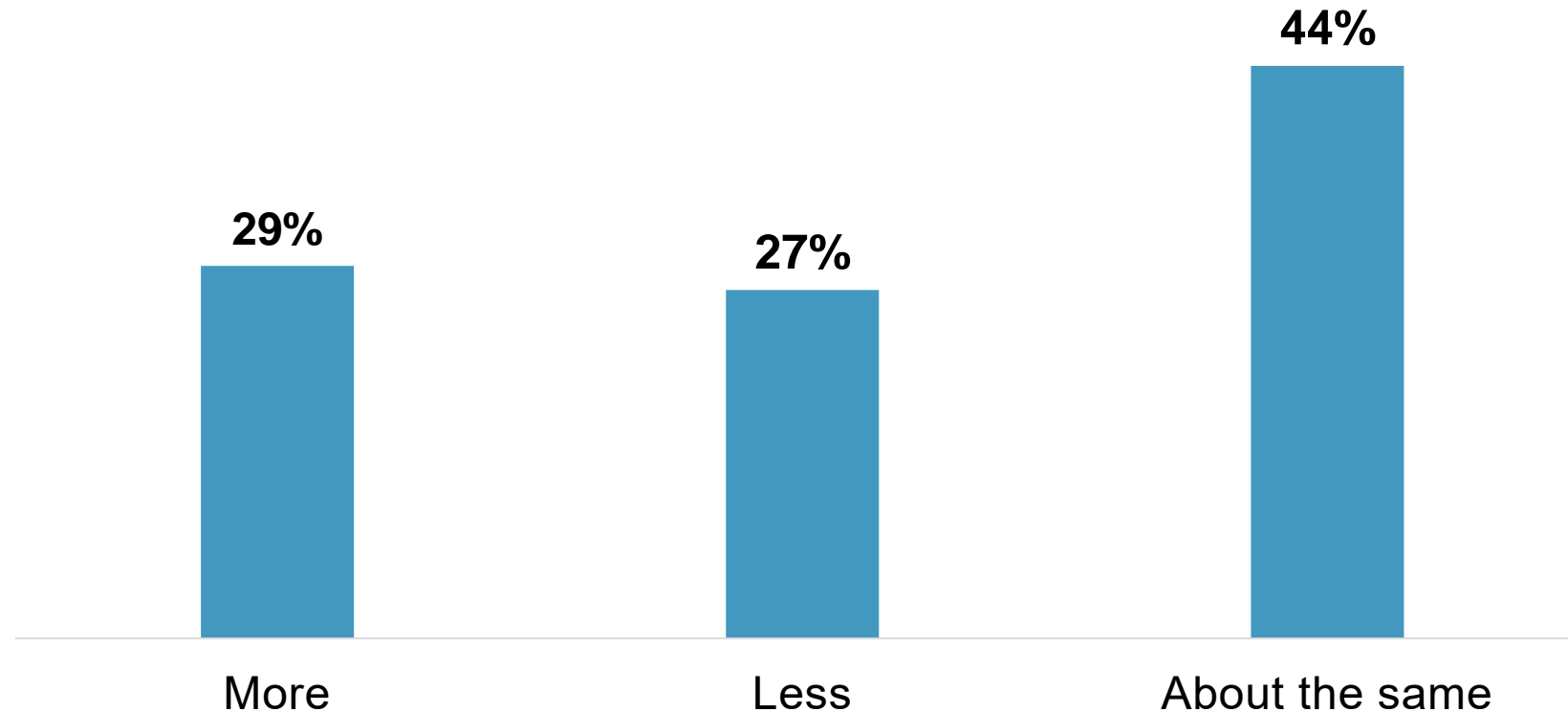
How many years have you been in your current position?



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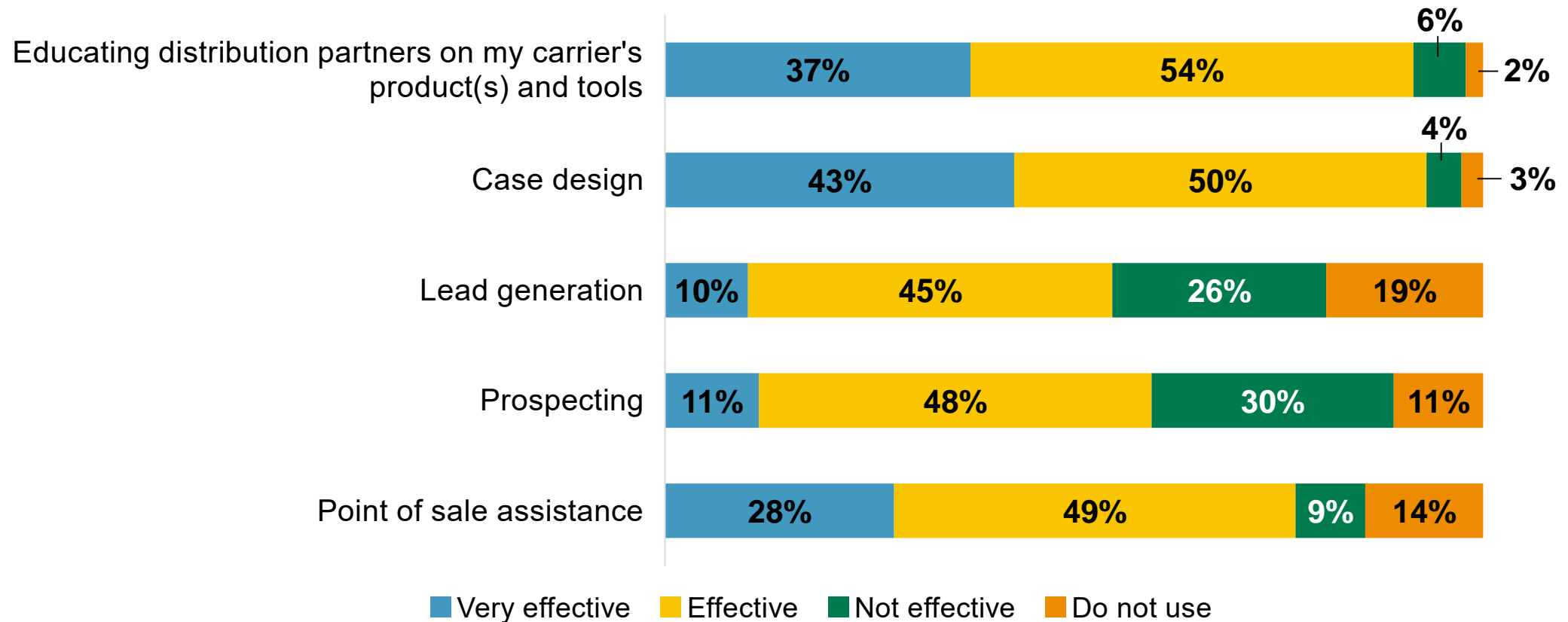
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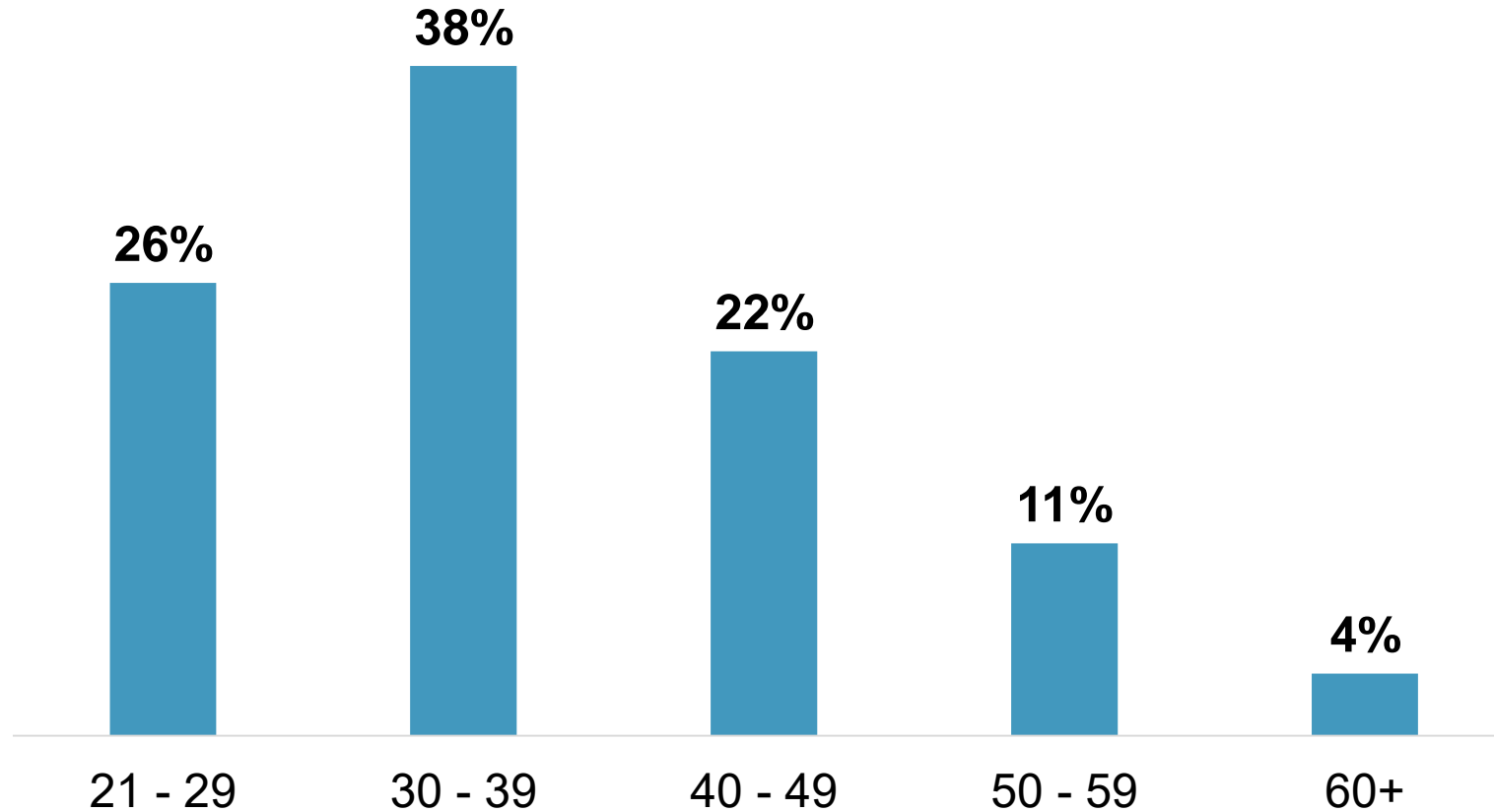
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# 2023 U.S. Wholesaler Study — Internal Wholesalers

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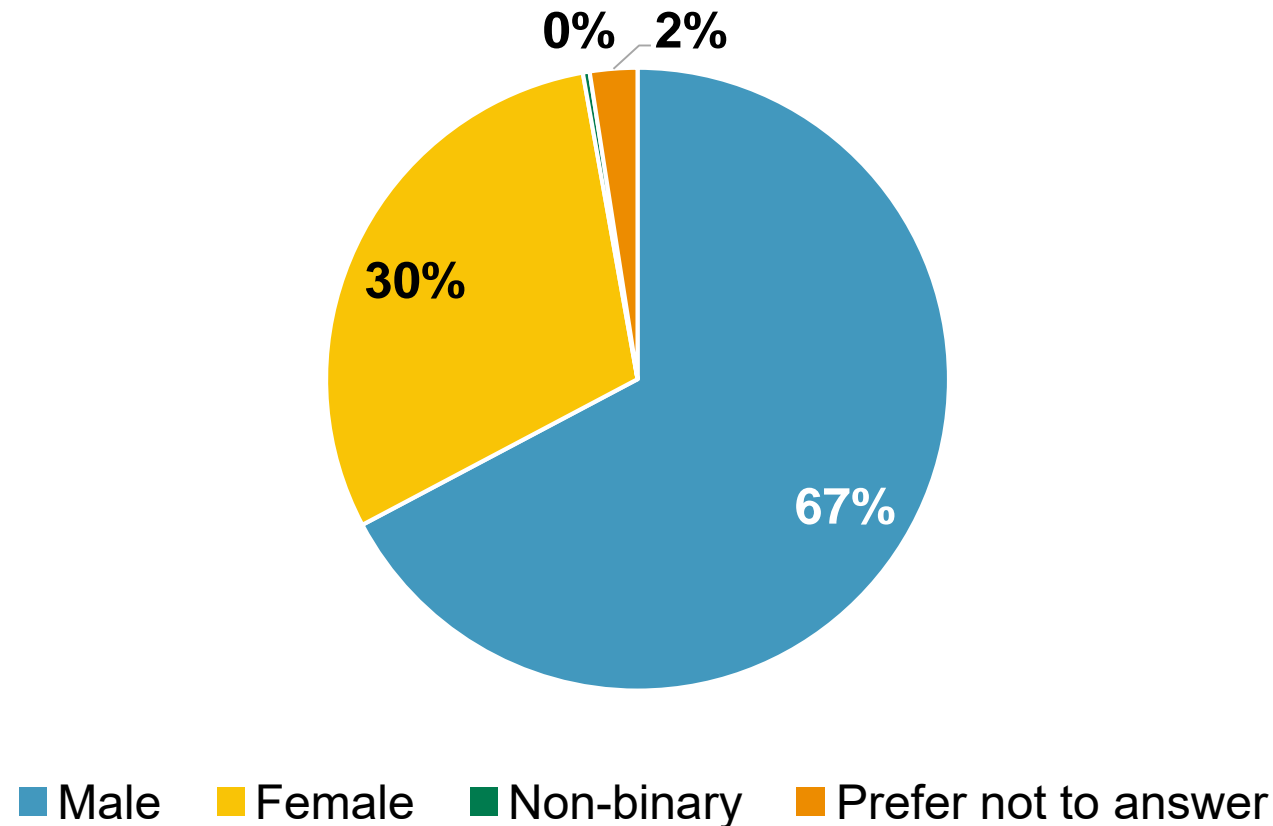
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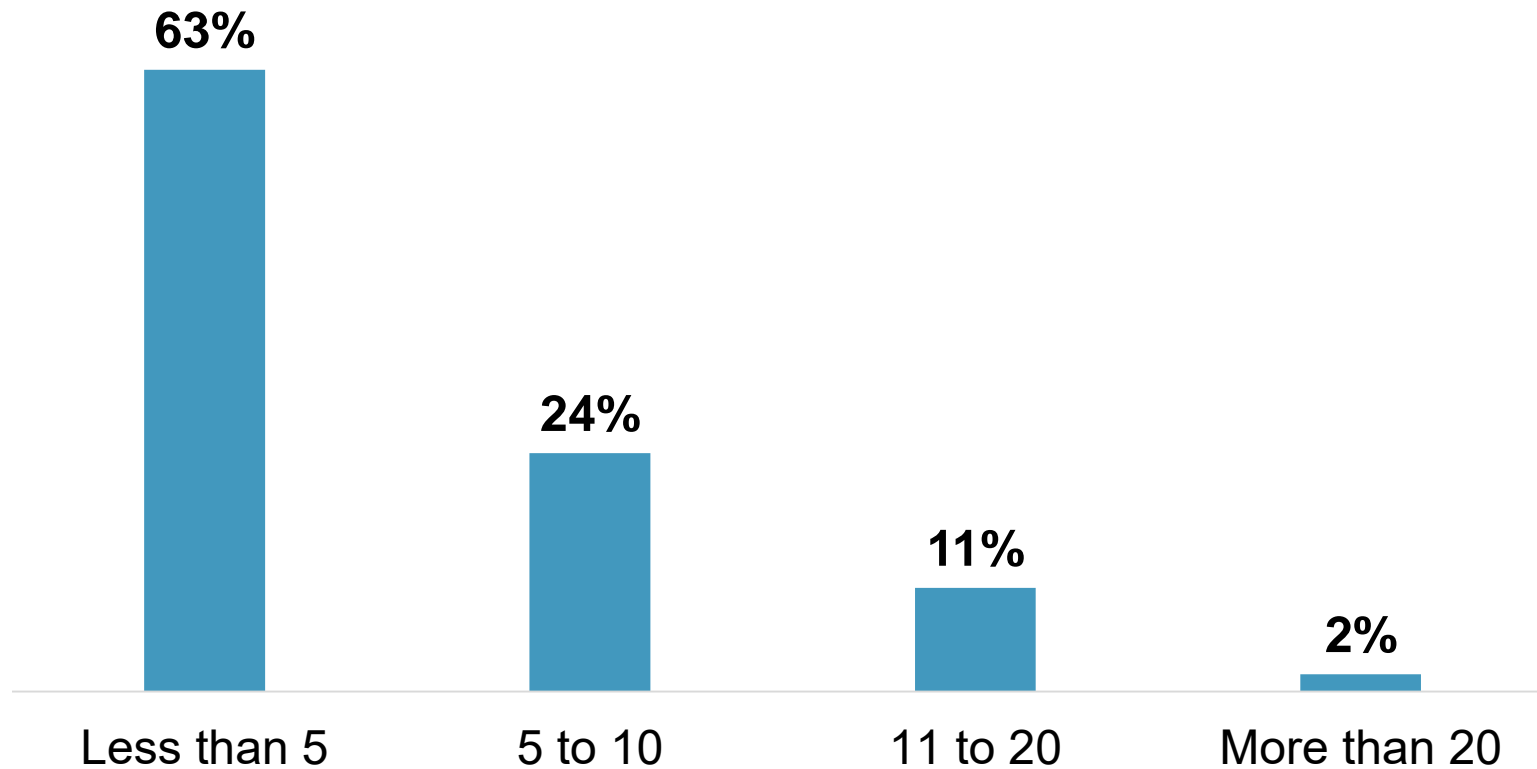
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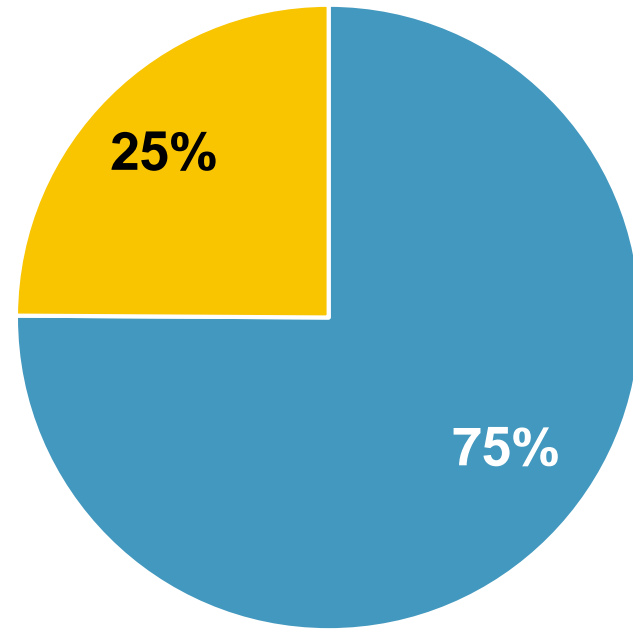
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# U.S. Wholesaler Study — Internal Wholesalers

## Internals: Percentage of time worked remotely versus in office

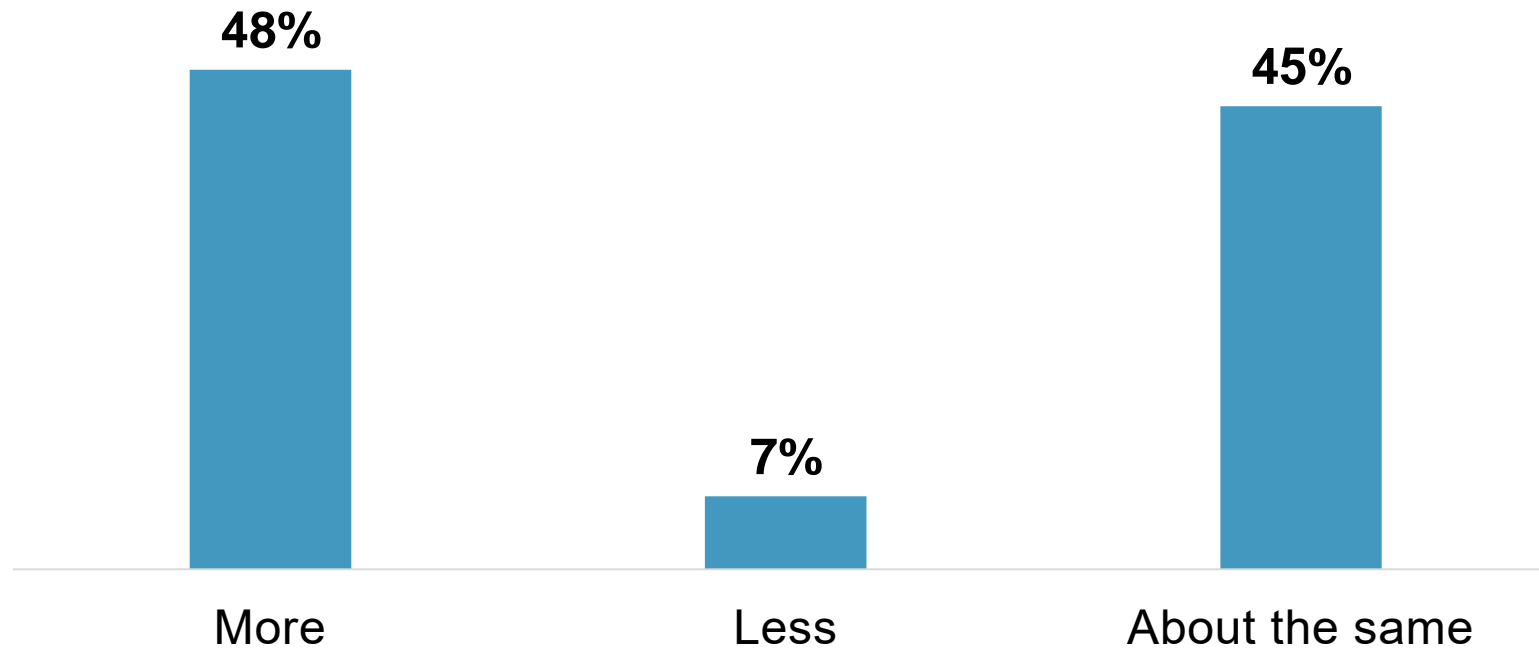


■ Work remotely    ■ Work physically in the office

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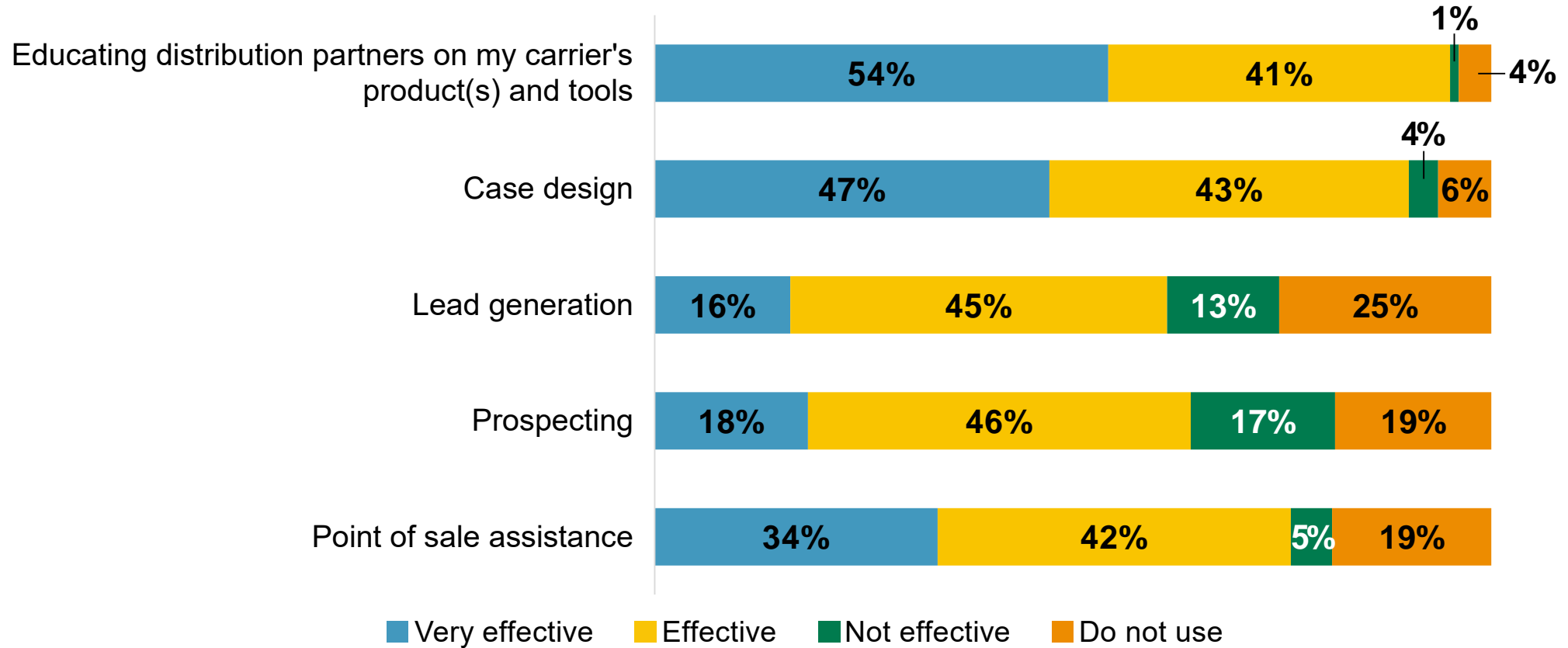
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# Summary

## **Overall wholesaling group:**

- Tenured (externals more so)
- Have been some movement among companies in past five years
- Female representation is up (more so among internal wholesalers)
- Wholesaling still very male dominated but making progress
- External wholesalers tend to be older and more tenured

## **Virtual Communications:**

- 80% of total group is using virtual communication the same or more than one year ago
- Lead generation and prospecting still challenging

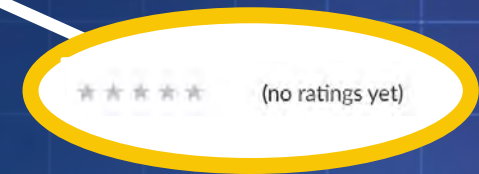
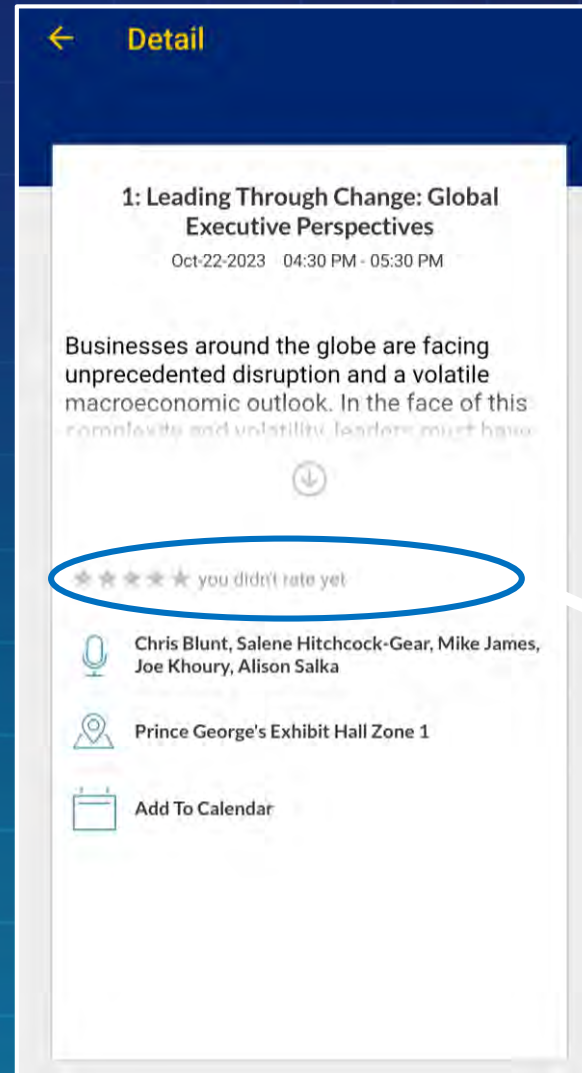


# Please Provide Your Feedback on the Conference App

## OPTION 1



## OPTION 2



# Thank You

