

David Daugherty of Preserve Wealth Oklahoma participates in Retirement Income Roundtable in New York

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Edmond, OK -- David Daugherty of Preserve Wealth Oklahoma participated in the Annexus Retirement Income Roundtable with award-winning economist Professor Robert Shiller in Manhattan, NY. David Daugherty joined Professor Shiller as one of a group of 25 elite financial professionals from across the nation to discuss how Athene's Balanced**Choice**[®] Annuity (BCA[™]) can help provide protection from direct downside market risk and the opportunity to realize interest earnings linked in part to growth in the equity markets while planning for lifetime income in retirement.

"People saving for retirement are always interested in continuing to grow retirement savings while reducing risk of future losses," says Don Dady, co-founder of Annexus. "With the BCA, we were able to provide a powerful solution for individuals seeking new accumulation options with zero downside market risk."

The BCA and its predecessors, designed by Annexus and its product design partner Genesis Financial, have provided strong returns over the last several years with no direct downside market risk. After historic stock market volatility and persistent low interest rates on traditional fixed investments, the BCA and other fixed indexed annuities have increasingly become a preferred choice for those planning for retirement.

"We've always been committed to creating innovative solutions to help people succeed in their retirement," said Annexus co-founder Ron Shurts. "Almost immediately, advisors and clients recognized opportunities of the BCA."

David Daugherty, whose local office is located at Preserve Wealth Oklahoma, was among the first to recognize the BCA's unique potential. His contributions to the Roundtable included ideas about where the future of the retirement income industry is headed and how to continue to help individuals planning for retirement.

[*About Annexus Group*](#)

Annexus is a Scottsdale, Arizona-based product development company focused on building solutions to deliver guaranteed capital preservation with potential for uncapped accumulation. Annexus connects carriers and top advisors with leading-edge wealth management products.

For further information about Annexus, please visit our website www.annexus.com.