



Life Insurance Company of the SW; National Life Group

National Life Group offers life insurance, annuity, and investment products to help individuals, families, and businesses pursue their financial goals.

Contact Information

- **Phone:**
214-722-9028
- **Enrollment Website:**
www.nationallife.com

Highlights

- Product Types: **Mutual Funds, Fixed/Indexed Annuities**
- 403(b) Assets Under Management: **>\$10B**
- National Life has **agreed** to offer and sell only products that met former Teacher Retirement System of Texas (TRS) Requirements as of 9/1/2019.
- Licensed by the Texas Department of Insurance (TDI)
- Enrollment Options: **Online, Mail, Phone, Representative**

Product Information

- Mutual Funds- Platform Access

Management Fee: 0.05%

Distribution/ 12b-1 Expenses: 1%

Loans: Yes

Loan Fixed Dollar Fee: \$100

Loan Interest Rate: Variable

Who keeps the interest? **Company**

- Fixed Annuity

Annual Fee: GLIR rides are 1%

Surrender Charges/ Withdrawal Fees:

7-10%

Surrender Period: 7-10 Years

Loans: Yes

Net Loan Interest Rate: Variable

Fixed Current Interest Rate: 1%

Guaranteed Interest Rate: 0.00%
Floor

- Indexed Annuity

Annual Fee: GLIR rides are 1%

Surrender Charges/ Withdrawal Fees:

7-10%

Surrender Period: 7-10 Years

Loans: Yes

Net Loan Interest Rate: Variable

Fixed Current Interest Rate: 1%

Guaranteed Interest Rate: Varies by contract based on indices chosen by participant

For more information, visit www.tasbo.org.

Note: The information in this document is based off a self-reported questionnaire submitted by the vendor.

Data as of 12/15/2020