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**Pacific Life Teams Up with SS&C's Black Diamond® to
Create the First Joint Advisory Trade Management Platform**

NEWPORT BEACH, Calif. ([Month Day, 2023])—Pacific Life today announced its collaboration with the SS&C Black Diamond® Wealth Platform, a prominent portfolio-management and data-integration provider, to offer Registered Investment Advisors (RIAs) a streamlined experience for managing the investment options in their clients' Pacific Life advisory variable annuities.

“RIAs told us they wanted the ability to manage and trade the investment options in our advisory variable annuities similar to how they manage their everyday investment portfolios. With the help of Black Diamond, we’ve made that happen,” said Jeremy Couch, Pacific Life’s advisory integrations solutions director. “RIAs can leverage Black Diamond’s technology directly on the Pacific Life platform in a way that’s familiar to them. It’s a much faster and easier process.”

In addition to a streamlined portfolio-management process, Pacific Life Trade Management powered by the SS&C Black Diamond® Wealth Platform features robust trading capabilities such as portfolio modeling and trading. Pacific Life expects to see a swift uptick in the number of RIAs using its advisory variable annuities now that barriers to using these tax-deferred strategies have been removed.

Industry-wide, many commission-free annuities have become easier and more transparent for RIAs to use and are growing in popularity. Pacific Life’s advisory annuities have no surrender fees and allow RIAs to bill their advisory fees of up to 1.50% annually directly on their clients’ annuities without creating a taxable event or reducing benefits. Our advisory annuities also offer access to institutionally priced investment options.

“We’re proud to be the first annuity provider to team up with industry giant Black Diamond to offer this kind of advanced trade-management platform,” said Doug Mantelli, a vice president in Pacific Life’s Consumer Markets Division. “As a leader in the RIA channel, we’re continuously innovating to make doing advisory annuity business with Pacific Life a refreshingly different experience for RIAs.”

For more information about Pacific Life Trade Management powered by the SS&C Black Diamond Wealth Platform, contact Jeremy Couch at Jeremy.Couch@PacificLife.com.

About Pacific Life

For more than 150 years, Pacific Life has helped millions of individuals and families with their financial needs through a wide range of life insurance products and annuities, and offers a variety of investment products and services to individuals, businesses, and pension plans. Whether your goal is to protect loved ones or grow your assets for retirement, Pacific Life offers innovative products and services that provide value and financial security for current and future generations. Pacific Life was named one of the 2023 World's Most Ethical Companies® by the Ethisphere Institute. For additional company information, including current financial strength ratings, visit www.PacificLife.com.

About SS&C Technologies

[SS&C](#) is a global provider of services and software for the financial services and healthcare industries. Founded in 1986, SS&C is headquartered in Windsor, Connecticut, and has offices around the world. Some 20,000 financial services and healthcare organizations, from the world's largest companies to small and mid-market firms, rely on SS&C for expertise, scale, and technology.

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Advisory fee withdrawals are limited to 1.50% of the annuity contract's cash value for the calendar year. Advisory fee withdrawals greater than 1.50% are not allowed. Withdrawals from the contract to pay advisory fees will reduce the contract value.

Pacific Life, its distributors, and respective representatives do not provide tax, accounting, or legal advice. Any taxpayer should seek advice based on the taxpayer's particular circumstances from an independent tax advisor or attorney.

Pacific Life is a product provider. It is not a fiduciary and therefore does not give advice or make recommendations regarding insurance or investment products.

Pacific Life is unaffiliated with SS&C Technologies Holdings, Inc., SS&C Advent, Black Diamond, and their affiliates.

Pacific Life refers to Pacific Life Insurance Company and its affiliates, including Pacific Life & Annuity Company. Insurance products can be issued in all states, except New York, by Pacific Life Insurance Company or Pacific Life & Annuity Company. In New York, insurance products are only issued by Pacific Life & Annuity Company. Product/material availability and features may vary by state. Each insurance company is solely responsible for the financial obligations accruing under the products it issues.

Variable insurance products are distributed by **Pacific Select Distributors, LLC** (member FINRA & SIPC), a subsidiary of Pacific Life Insurance Company and an affiliate of Pacific Life & Annuity Company.

The home office for Pacific Life & Annuity Company is located in Phoenix, Arizona. The home office for Pacific Life Insurance Company is located in Omaha, Nebraska.

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