

## Western & Southern ranks second in the J.D. Power 2025 U.S. Individual Annuity Study<sup>SM</sup>



### Western & Southern outperforms the study average for all drivers of satisfaction



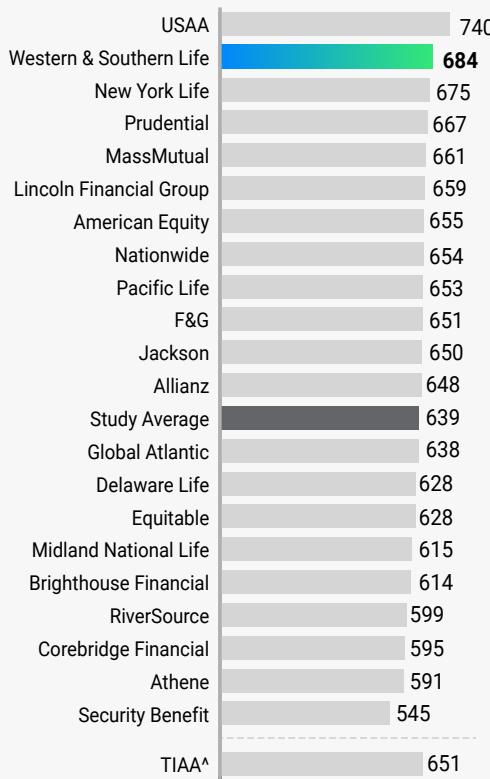
Western & Southern  
Financial Group

Even in an industry environment where overall customer satisfaction with individual annuities declines by 6 points year over year, Western & Southern's Overall Satisfaction Score (OSAT) increases by 20 points year over year. In addition, the company achieves an OSAT of 684, 45 points above the industry average. This performance, along with the increase in rank position from 6th to 2nd place between 2024 and 2025, reflects the commitment of the Western & Southern team to delivering a satisfying experience for annuity customers.

The J.D. Power 2025 U.S. Individual Annuity Study<sup>SM</sup> measures the experiences of customers of the largest individual annuity companies in the United States across eight core dimensions (in order of importance): trust; value for price; ability to get service; ease of doing business; people; product offerings; digital channels; and problem resolution. The 2025 study is based on responses from 4,682 individual annuity customers and was fielded from August 2024 through July 2025.

#### J.D. Power 2025 U.S. Individual Annuity Study<sup>SM</sup>

Overall Satisfaction Index (Satisfaction scores on a 1,000-point scale)



Note: <sup>^</sup>Brand is not rank eligible because it does not meet study award criteria.

Source: J.D. Power 2025 U.S. Individual Annuity Study<sup>SM</sup>. Charts and graphs extracted from this press release for use by the media must be accompanied by a statement identifying J.D. Power as the publisher and the study from which it originated as the source. Rankings are based on numerical scores, and not necessarily on statistical significance. No advertising or other promotional use can be made of the information in this release or J.D. Power survey results without the express prior written consent of J.D. Power.

#### Western & Southern Dimension Score Highlights

DIMENSION	VS.	INDUSTRY AVERAGE
Trust	693	<b>653</b>
Value for price	668	<b>620</b>
Ability to get service	711	<b>657</b>
Ease of doing business	672	<b>638</b>
People	714	<b>663</b>
Product offerings	665	<b>640</b>
Digital Channel	678	<b>613</b>
Problem Resolution	703	<b>650</b>



At Western & Southern, customer satisfaction is at the heart of everything we do. We strive to make every interaction simple, deliver proactive solutions our clients value, and create magical moments that make each customer feel appreciated."

- Paul Moore, SVP & Chief Customer Officer