

**Midland National and Dimensional Fund Advisors Announce Collaboration to
Deliver New ETF-based Custom Index Annuity Solutions for Advisors and Their Clients**
Bridging traditional investments with contemporary solutions to empower financial advisors.

May 7, 2025 – West Des Moines, Iowa – [Midland Advisory](#), part of [Midland National® Life Insurance Company](#), announces a new collaboration with [Dimensional Fund Advisors](#) to enhance index-linked annuity solutions. This initiative introduces a creative way for advisors to access Dimensional's investment philosophy within the framework of a registered index-linked annuity (RILA), in which performance is linked to a custom index constructed using Dimensional's industry-leading systematic active Exchange Traded Funds (ETFs).

At the core of this joint effort is a shared mission: to equip financial advisors with index crediting strategies that align with Dimensional's systematic, research-driven approach to investing. The index draws on the performance of the underlying Dimensional ETFs, which are designed to pursue higher expected returns than the broader market. By offering this index option, Midland National provides advisors and their clients with a structured growth opportunity within an annuity framework, combining exposure to the potential returns of equity markets with a RILA's index-linked strategies. This index is one of several available options, as potential performance may also be linked to two other indices or based on seven variable subaccounts.

With the introduction of the **Dimensional US Equity Core Plus Index**, Midland National diversifies and enhances its RILA solution by offering the only index currently available in the RILA space comprised of Dimensional active ETFs. This combination allows advisors to offer their clients a familiar investment avenue while simultaneously integrating a level of protection with the benefits of an annuity.

"Our collaboration with Dimensional reflects our shared commitment to providing solutions that align with the evolving needs of financial advisors and their clients," explained Rob TeKolste, President of Sammons Independent Annuity Group. "By offering index exposure that draws on Dimensional ETF strategies, we equip advisors with investment options that balance growth potential with protection."

"Throughout our history, Dimensional has focused on delivering the best possible investment experience to financial professionals and their clients," said Carlo Venes, Co-Head of the Global Client Group at Dimensional. "We look forward to furthering this effort alongside Midland Advisory to bring our diversified, low-turnover solutions to more annuity investors nationwide."

The Dimensional US Equity Core Plus Index is a US equity market index designed to offer broad diversification with a strong emphasis on areas of the market that Dimensional research has shown to outperform over time. By embedding this index into an annuity framework, Midland National provides a cost-effective setup that supports client goals and risk management.

This collaboration marks a turning point in the annuities market, offering advisors and clients alike a robust platform designed for today's financial challenges. Financial advisors eager to explore this innovative blend of investment strategies and annuity solutions are invited to connect with the Midland Advisory team. To learn more, visit [MidlandAdvisory.com](#).



About Midland National Life Insurance Company

For more than 115 years, [Midland National® Life Insurance Company](#) has been a financial services industry leader, crediting the company's strength to its commitment to stability, innovation, and dedicated customer service. Midland National is a member of [Sammons® Financial Group](#), a subsidiary of [Sammons Enterprises, Inc.](#)

Midland Advisory, part of Midland National® Life Insurance Company, specializes in retirement solutions to help meet the needs of registered investment advisors (RIAs) and their clients. Midland Advisory is not an issuer of insurance products. Securities distributed by Sammons Financial Network®, LLC., member [FINRA](#).

About Dimensional Fund Advisors

Dimensional is a leading global investment firm that has been translating academic research into practical investment solutions since 1981. Guided by a strong belief in markets, we help investors pursue higher expected returns through a systematic investment process that integrates research insights with advanced portfolio design, management, and trading while balancing trade-offs that can impact returns. Dimensional is headquartered in Austin, Texas, and has 15 global offices across North America, Europe, Asia, and Australia. As of March 31, 2025, Dimensional manages \$786 billion for investors worldwide. For more information, please visit [dimensional.com](#).

Media Contact:

Kevin Waetke

kwaetke@sfgmembers.com

Cell: 515.608.2558

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