

July 12, 2022 – InSource is thrilled to announce that it has partnered with Luma Financial Technologies to bring its market-leading financial technology platform to InSource’s financial advisor clients. Luma’s turnkey solution helps financial advisors elevate their services by removing industry challenges and simplifying the annuity and structured product transaction process. By providing best-in-class tools to more easily learn, create, buy, compare and track these products, Luma empowers advisors to expand their book of business.

“InSource is excited to take the next step in our partnership with the Luma team,” said InSource president, Jim Nickens. “Through the expansion of our partnership, advisors working with InSource will gain access to an industry-leading experience via PAM—the Portal for Asset Management—with a goal to provide analysis and increased trading efficiencies. In turn, this will enable advisors to have more time with those who have entrusted them with their financial health.”

Luma’s award-winning solutions allow their customers to discover the most suitable products for their clients through innovative data modeling, insights, and comparison features. Users of the platform can create optimal opportunities that match each of their client’s unique objectives.

“With our shared commitment to empowering advisors through new efficiencies and services, our partnership with InSource is a natural fit,” said Tim Bonacci, CEO & President at Luma Financial Technologies. “We’re excited to be reaching more advisors through this enhanced relationship and we look forward to engaging further with InSource as more investors turn to the alternatives space in search of solutions to help meet their investment objectives.”

About InSource

Established in 1987, InSource is a family-owned insurance brokerage firm located in Indianapolis that markets annuity and life insurance products to banks, broker-dealers and financial advisors. Our unique business model of wholesaler support is based on quality relationships that are built on trust, integrity, and a sincere interest in mutual success. For more information, please visit [our website](#) or [LinkedIn](#).

About Luma Financial Technologies

Luma Financial Technologies is the creator of LUMA, a fully customizable, independent, buy-side technology platform that helps financial teams more efficiently learn, create, order, and manage market-linked investments such as structured products, annuities and more.

Launched in 2011, LUMA is one of the largest and longest-tenured structured product platforms in the U.S. market and is used by broker/dealer firms, RIA offices and private banks to automate and optimize the full process cycle for offering and transacting in market-linked investments. This includes education and certification; creation and pricing of custom structures; order entry; and post-trade actions. LUMA is multi-issuer, multi-wholesaler and multi-product, thus providing teams with an extensive breadth of market-linked investments to best meet clients’ specific portfolio needs.

Headquartered in Cincinnati, OH, LUMA also has offices in New York, NY, Zurich, Switzerland, and Miami, FL. For more information, please visit [Luma’s website](#), or follow us on [LinkedIn](#) and [Twitter](#).

For more information, contact:

Meghan Eddy
(720) 340-6266
meghan.eddy@insourcemg.com