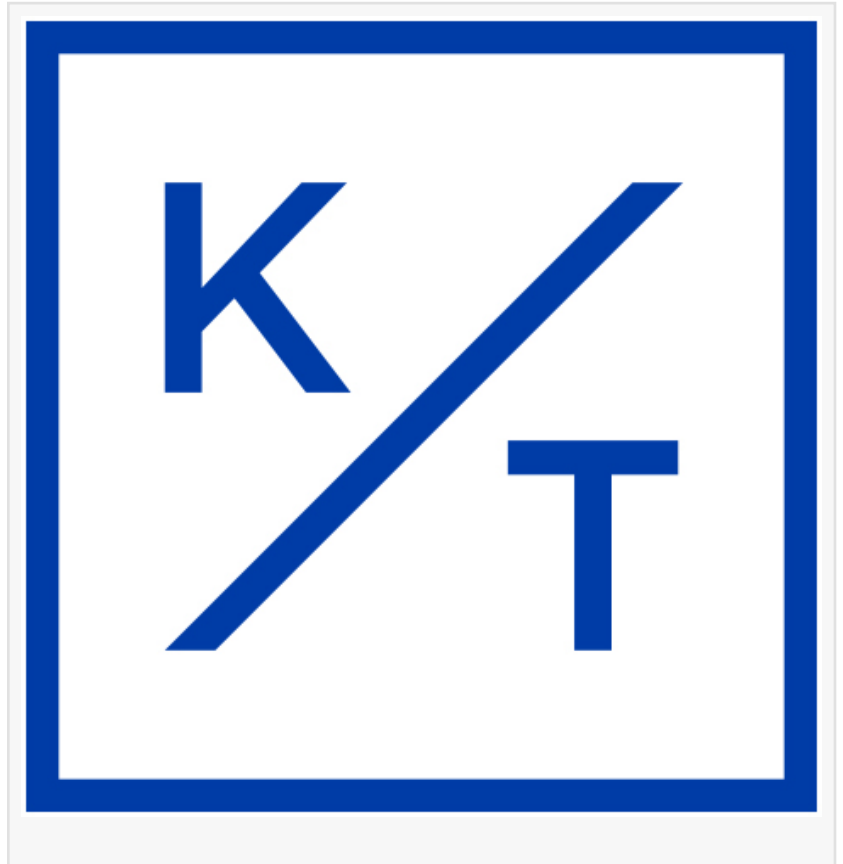


IMPORTANT NOTICE TO INVESTORS FACING LOSSES FROM HIGH-FEE ANNUITIES OR INSURANCE-BASED INVESTMENTS

Did Your Financial Advisor Recommend Insurance or Annuities as Investments, Causing You Damages? Please Contact KlaymanToskes Immediately

NEW YORK, NY, UNITED STATES, June 24, 2025 /EINPresswire.com/ -- [KlaymanToskes](#), a leading national securities and investment loss law firm, is conducting a nationwide investigation into financial advisors and brokerage firms who unsuitably recommended [variable annuities](#) and [life insurance policies](#) as investment strategies. These complex products often involve steep surrender charges, excessive fees, and unexpected tax consequences—frequently sold without proper assessment of the investor's financial objectives, risk tolerance, or liquidity needs. These products, when used as investment vehicles, can also cause underperformance damages meaning an investors' funds would have yielded higher returns if invested in the markets.



Investors who were unsuitably sold annuities or life insurance by their financial advisor or brokerage firm are encouraged to contact KlaymanToskes at 888-997-9956. Consultations are free and confidential, and investors may be eligible to pursue financial recovery through FINRA arbitration.

KlaymanToskes is actively representing investors in FINRA arbitration claims against brokerage firms and financial advisors who recommended high-cost annuities and insurance-based investment products. These legal claims allege that brokers misrepresented key risks, fees, and the illiquid nature of these investments. Investors further allege that advisors failed to disclose

surrender charges, potential tax penalties, and hidden commissions. In many cases, retirement funds—including IRAs and 401(k) rollovers—were inappropriately used to purchase these complex annuity and insurance products.

The law firm's ongoing investigation indicates that many recommendations involving annuities and insurance products violated key FINRA regulations and federal investor protection standards. Specifically, a financial advisor's duty to provide suitable investment recommendations, and Regulation Best Interest (Reg BI), which requires broker-dealers to act in the best interests of their customers when making investment recommendations

In some cases, financial advisors may have prioritized high commissions over a customer's best interest, recommending investment strategies promising tax advantages or "guaranteed" returns that instead resulted in significant financial harm.

Investors who suffered significant financial damage due to recommendations to purchase variable annuities or life insurance policies by their broker/investment advisor are encouraged to contact attorney Steven D. Toskes at (888) 997-9956 or by email at investigations@klaymantoskes.com for a free and confidential consultation to discuss potential recovery options.

About KlaymanToskes

KlaymanToskes is a leading national securities law firm which practices exclusively in the field of securities arbitration and litigation on behalf of retail and institutional investors throughout the world in large and complex securities matters. The firm has recovered over \$600 million in Securities Litigation and FINRA Arbitration matters. KlaymanToskes has office locations in California, Florida, New York, Omaha, and Puerto Rico.

Disclaimer

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