

Allocation change guide North American fixed index annuities

1. After logging into the **NorthAmericanCompany.com** agent website, navigate to My Business > Inforce Contract Access.
2. Search for the contract on which you wish to make an allocation change.
3. Click on “Allocations” in left navigation under “Inforce Business Search” and a new window will open.
4. Click “Make Changes” at the bottom right and the new allocation column will be activated for you to make the allocation changes desired. **Changes are only allowed 30 days following the contract anniversary.**

Agent view

Inforce Business Access

- ▶ Contract Details
- ▶ Contract Values
- 3 Allocations
- ▶ Participant Details
- ▶ Transaction History
- ▶ Correspondence

Contract Summary

Contract Number	- 000000000
Product:	- NAC fixed index annuity
Contract Status	- Active (inforce)
Death Benefit Amount	- \$215,521.88
Accumulation Value	- \$215,521.88
Tax Qualification Code	- IRA

Index A w/Fee

Changes are allowed once within the 30 calendar days that follow your contract anniversary date of 10/29/2022

Total Accumulation Value \$190,000.00	Make Changes
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5. Once percentages or dollar figures are input, click “Confirm Changes” and the agent and contract holder will receive a confirmation of the changes made.

NOTE:

- Changes on this page can be made by either the agent or contract holder.
- **Once changes are submitted they are final and cannot be changed until the next allocation period.**
- If the percentages do not equal 100%, an alert will appear and the “Confirm Changes” button will be inactive (example below).

Agent and client view

Fixed	1% Fixed Rate	0.00%
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Annual Point-To-Point ⓘ

Fund	Rate Strategy	Current Percentage Allocated	Current Value Allocated	New Allocation
AP2P Index A Prate w/Fee	115% Par Rate	38.88%	\$25,350.00	<input type="text" value="0.00"/> %
AP2P Index B Prate w/Fee	130% Par Rate	38.88%	\$25,350.00	<input type="text" value="100.00"/> %
AP2P Index C Prate w/Fee	110% Par Rate	22.24%	\$14,504.32	<input type="text" value="0.00"/> %
Index C	50% Par Rate	0.00%	\$0.00	<input type="text" value="0.00"/> %
Index A	55% Par Rate	0.00%	\$0.00	<input type="text" value="0.00"/> %
Index A w/Fee	115% Par Rate	0.00%	\$24,969.75	<input type="text" value="0.00"/> %
Index B	60% Par Rate	0.00%	\$0.00	<input type="text" value="0.00"/> %
Index B w/Fee	130% Par Rate	0.00%	\$24,969.75	<input type="text" value="0.00"/> %
Index C w/Fee	110% Par Rate	0.00%	\$14,286.76	<input type="text" value="0.00"/> %

Two Year Point-To-Point ⓘ

Fund	Rate Strategy	Current Percentage Allocated	Current Value Allocated	New Allocation
Index A				
📅 2021-2023	80% Par Rate	0.00%	\$0.00	0.00%
Index A w/Fee				
📅 2021-2023	160% Par Rate	0.00%	\$0.00	0.00%

Total Accumulation Value \$65,204.32	Total Allocated 100.00%	Remaining to Allocate 0.00%
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Total Allocation must equal 100% or Total Accumulation Value

Total Accumulation Value \$150,000.00	Total Allocated 199.58%	Remaining to Allocate -99.58%
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Confirm Changes

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