Annuity

NORTH AMERICAN℠
A Sammons Financial Company

Annuity e-App

From issue to post-issue

Be the guide your clients need when completing service requests

1

- **Annuity e-App** is your go-to resource offering a streamlined way through the application process, automatically accessing the product- and state-specific forms you need, plus get real-time progress tracking and convenient **e-signature** capability.

2

- **Suitability Pre-Check**, built into Annuity e-App, completes the suitability portion of the application first to identify if the case will be able to be approved with North American.

3

NEW!

- **Post-issue forms**, help your customers handle paperwork efficiently through e-App for the most common post-issue requests. Post issue requests include:
  - Account allocation
  - Address/name change request
  - Authorization to transfer funds
  - Certificate of Power of Attorney
  - Certification of charitable trust
  - Certification of trust agreement
  - Electronic funds draft authorization for premium payments
  - Electronic funds transfer for withdrawals
  - Lifetime income payment election
  - Multi-year guarantee period election
  - Partial withdrawal request
  - Release of customer information authorization
  - Request for Taxpayer Identification Number and certification
  - Required minimum distribution request

Questions? Call Sales Support at 866-322-7066

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