Annuity

Want faster business?

Go digital!

Avoid being on hold or messing with paper

NORTH AMERICAN®
A Sammons Financial Company

Products issued by North American Company for Life and Health Insurance®

What do top agents do to get business issued faster?

- Use suitability pre-check within e-Biz to quickly identify if the case will be approved
- Use e-Biz to avoid NIGO (not in good order)
- Use ACH to transfer funds quickly
- Use secure upload for your documents for both new business and service requests

Utilize our new **NorthAmerican+** platform to get real time status updates on your pending business, view commission information, upload/manage required documents - plus much more!

Helpful links

NorthAmericanCompany.com

NorthAmerican+

e-Biz

Secure upload

Illustrations

Once the contract is issued…

Delivery receipts and contract view

Once issued, your clients can sign, scan or take a picture of the delivery receipt and send it to you. The receipt can then be submitted to us by email or secure upload.* You can also view client's inforce contracts online.

*Remember to check on your state insurance department's website for delivery requirements.

Post-issue services online

Make elections

- Account allocation elections
- Lifetime income payment elections
- Multi-year guarantee period elections

Make or authorize requests

- Address/phone/email/name change requests
- Electronic funds transfer withdrawal requests
- Partial withdrawal requests
- Required minimum distribution request
- Authorize to transfer funds
- Authorize electronic funds draft for premium payments
- Notification of death (web only)

Get certifications or releases

- Request for Taxpayer ID Number and certification
- Customer information authorization release
- Certificate of Power of Attorney
- Certification of charitable trust
- Certification of trust agreement

And don't forget about business reporting online

- Analyze production, commissions, pending business, and more
- Schedule one-time reports or recurring feeds of all the data you need conveniently delivered to your inbox

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