Annuity

Issued by North American Company for Life and Health Insurance®

Who to call at North American

We're here to help. To resolve your questions as quickly as possible and help our specialists focus on what they do best, please refer to this handy grid to determine where to direct your calls, faxes and emails.

Topic	Best team to answer your question	Contact information
Outstanding requirements (applications, allocation forms, disclosure forms, transfer and replacement forms)	**New Business**	Phone: **866-322-7067 option 2** Fax: **866-322-7073** Email: *fixednewbusiness@sfgmembers.com*
Suitability review (suitability questions, suitability pre-check and suitability forms/requirements)	**Suitability**	Phone: **877-858-1364** Fax: **855-293-1608** Email: *suitability@sfgmembers.com*
Agent Contracting (agent onboarding, state appointments, agent training, agent maintenance, licensing requirements on pending business)	**Agency Services-Contracting**	Phone: **866-322-7068, option 1** Fax: **866-322-7072** Email: *nacontracting@sfgmembers.com*
Commissions (pay frequency, commission statements and schedules, compensation reconciliation)	**Agency Services-Commissions**	Phone: **866-322-7068, option 2** Fax: **866-322-7072** Email: *annuitycommissions@sfgmembers.com*
Sales support and marketing (what products may suit your clients, agent training, illustrations, marketing materials and promotions)	**Marketing and Sales**	Phone: **866-322-7066** Fax: **866-322-5933** Email: *nannuities@sfgmembers.com*
Review/approval of your advertising materials	**Advertising Review**	Email: *adreview@sfgmembers.com*
Questions on submitting a death claim or status of a pending claim	**Claims**	Phone: **877-880-6367** Fax: **877-586-0249**
Questions on already-issued policies, transfers to an outside company and other customer service questions	**Client Services**	Phone: **866-322-7069** Fax: **866-322-7071** Email: *annuitycorrespondence@sfgmembers.com*

FOR FINANCIAL PROFESSIONAL USE ONLY. NOT TO BE USED FOR CONSUMER SOLICITATION PURPOSES.

Hours of operation

North American Company for Life and Health Insurance® hours of operation are Monday through Thursday 7:30 a.m. to 5 p.m. and Friday 7:30 a.m. to 12:30 p.m. Central time.

Ease of business tools

NorthAmerican+

NorthAmerican+ helps create a seamless experience for both you as a financial professional and us as home-office staff for contracting, new business, and more. Access **NorthAmerican+** from the agent dashboard on the Annuity homepage.

- View real-time status updates on your pending business
- See your inforce policies all in one place
- View commission information
- Secure document upload: upload and manage required documents for contracting, new business, or suitability
- Set and update your producer profile
- Check the status of your contracting paperwork
- If applicable, access downline information

Producer Profile Tool

The Producer Profile feature via **NorthAmericanCompany.com** allows you to manage and monitor your business effectively. Use the **My Business** tab and select **Producer Profile** in **Quick Links**.

- Access demographic and financial information like primary address, email, phone number, bank details, and commissions
- View your downline hierarchy reports in the Hierarchy tab
- Check the status of an agent's AML and Annuity product specific trainings

Annuity e-Biz

Access all the following features when you log in at **NorthAmericanCompany.com/Annuitye-Biz**: illustrations, suitability pre-check, applications, post issue forms, 1035 carrier look-up, and more.

Suitability pre-check can aid in application pre-approval, saving both you and the client time, minimizing not in good order (NIGO) issues, and confirming approval.

Remember, using **Annuity e-biz can help you get your business processed faster** versus a standard paper application.

On the go and need to check your pending business? Visit **NorthAmericanCompany.com**, enter your username and password, and follow the steps to get started.

Sammons Financial® is the marketing name for Sammons® Financial Group, Inc.'s member companies, including North American Company for Life and Health Insurance®. Annuities and life insurance are issued by, and product guarantees are solely the responsibility of, North American Company for Life and Health Insurance.

FOR FINANCIAL PROFESSIONAL USE ONLY. NOT TO BE USED FOR CONSUMER SOLICITATION PURPOSES.