

## STEPS TO ISSUING YOUR CLIENT'S POLICY

North American helps lead the way in educating and informing your clients about their annuity purchases. In order to help clients reach their financial goals, it's important for us to keep clients informed.

There are several steps that take place to ensure your clients understand their annuity contracts. These steps are just part of the process to help them reach their retirement goals. By working together with North American to effectively communicate with your clients about their annuities, you can help their financial goals become reality.

### HERE ARE THE IMPORTANT STEPS THAT TAKE PLACE AFTER AN ANNUITY CONTRACT IS ISSUED:

1. As the agent, you will receive the annuity contract in the mail along with the delivery receipt.
2. You will deliver the policy and obtain a signed delivery receipt and answer any client questions.  
You are responsible to:
  - Verify that the policy information is accurate and complete
  - Inform the client that they will receive a LIMRA survey in the mail
  - Notify the client that they may receive a call from the home office
  - Return the signed delivery receipt to the home office
3. Your client may receive a telephone call from the home office, once the delivery receipt has been received. A letter was included in the annuity policy detailing what will be discussed during the client phone call.
4. A LIMRA survey is mailed to the client after the annuity contract has been issued. All survey responses are returned to LIMRA and eventually forwarded to North American. After the results have been reviewed, the client may be further contacted by North American.

### FIRST CONTRACT ANNIVERSARY:

Your client will receive a statement outlining the index credits/Interest Credits (if any) for the year and other activity details for their annuity contract.

If a client has purchased a Fixed Index Annuity, he/she will receive a Fixed Index Annuity product specific CD-ROM that reiterates the various features and benefits of the Fixed Index Annuity.

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North American takes great pride in helping ensure your client understands the value of the annuity purchased. Together, we work to help your clients reach their financial goals.

Please contact **Sales Support at 866-322-7066** for questions or assistance. We appreciate your support and thank you for your continued business.

