

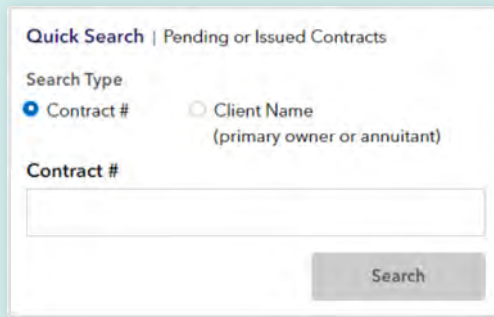
Access client tax documents on Athene Connect

Follow the steps below to access client tax documents on Athene Connect.

1 Log into the Athene Connect website at www.athene.com/producer/login

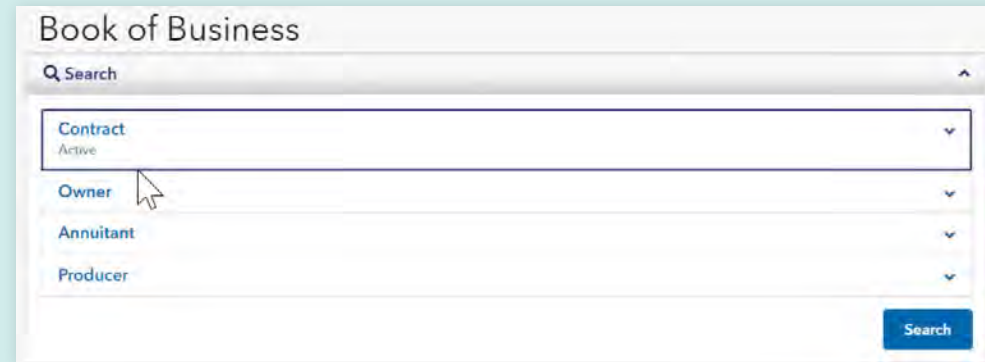
2 Search for tax documents by contract or client name using one of the following locations:

a. Quick Search Dashboard



The screenshot shows the 'Quick Search' interface for 'Pending or Issued Contracts'. It features a 'Search Type' section with two radio buttons: 'Contract #' (selected) and 'Client Name (primary owner or annuitant)'. Below this is a text input field labeled 'Contract #' and a 'Search' button.

b. Search section on your Book of Business report



The screenshot shows the 'Book of Business' search section. It has a search bar with a magnifying glass icon and the word 'Search'. Below the search bar is a dropdown menu with four options: 'Contract Active', 'Owner', 'Annuitant', and 'Producer'. A mouse cursor is pointing at the 'Owner' option. A 'Search' button is located at the bottom right of the section.

c. Hyperlink from any of the following:

- i. Recent Business Issued report grid
- ii. Production Summary
- iii. Alerts report grid
- iv. Commissions Statements
- v. Downline Commissions
- vi. Any reports selected from the Downline Search page

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Open the Client View page using one of the following methods:

- a. Find the client on a report grid and select the client name.
- b. From the Application Details/Contract Details page, select the client name.

Quick Search

Search for pending or issued contracts by client name (primary owner or annuitant only) or contract number.

Client Name ▾ Colorado

8 results for Colorado

	Contract #	Owner Name	Annuitant Name	Product	Status
Preview	33 [REDACTED]	Colorado, Don	Colorado, Don	Performance Elite Plus 7	Active
Preview	33 [REDACTED]	Colorado, Don	Colorado, Don	Athene MYG 5	Pending
Preview	33 [REDACTED]	Colorado, Max	Colorado, Max	Athene Agility 10	Active
Preview	33 [REDACTED]	Colorado, Max	Colorado, Max	Athene Amplify 2.0 NF	Active

33 ✓ Active

Type	Product	Issue Date	Tax Qualification
Indexed Annuity	Performance Elite Plus 7	12/20/2021	IRA

Owner(s)

Colorado, Don

Male

DOB: [REDACTED]

4 [REDACTED] Parkway

[REDACTED] IA 50 [REDACTED]

[View Owner Details](#)

Annuitant(s)

Don Colorado

Male

DOB: [REDACTED]


[View Annuitant Details](#)

Beneficiary(ies)

Primary

100% - Ben [REDACTED]

- 4 From the Client View page, you will see a Tax Documents section that houses any available Athene tax documents you have access to for that client.



The screenshot shows a client profile for "Adams, David". Under the "Contact Info" section, the following details are visible: Email: testing@[redacted].com; Phone: 515-111-[redacted]; Mailing Address: 7 [redacted] it, Olympia, WA 98 [redacted]. Below this is a "Tax Documents" section with the text "Tax documents are only available for the primary contract owner."

Note: You will only be able to see client tax documents for contracts you are actively servicing.

- 5 To access the tax documents, you must complete a Multi-Factor Authentication (MFA) by selecting the 'Get Tax Documents' button and following the MFA steps.



The screenshot shows the "Tax Documents" section with the text "Tax documents are only available for the primary contract owner." and a button labeled "Get Tax Documents".

Note: The MFA only needs to be completed once per login session.

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Once the MFA has been successfully completed, you can download any available tax document. The client's mail preference will also be listed on this page.

Tax Documents

Tax documents are only available for the primary contract owner.

Client's Current Delivery Preference: Mail

Tax documents for the most recent year are required to be mailed by January 31st. Documents will display online as soon as they are available.

Tax Year
2022

Type	Tax State	Contract #	
5498	Iowa	33[REDACTED]	Download
1099-R	Iowa	33[REDACTED]	Download

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