

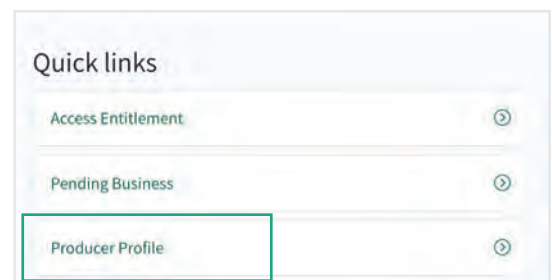
Producer Profile tool on NorthAmericanCompany.com

The Producer Profile feature on NorthAmericanCompany.com offers tools and resources to help effectively manage and monitor your business! Explore the benefits of the Producer Profile and access tools to assist with contracting, commissions, and reporting.

How to access Producer Profile

1. Go to www.northamericancompany.com
2. Click **login** and enter the **username** and **password**
3. Access the **My Business** tab and click on **Producer Profile** under the **Quick links** section.

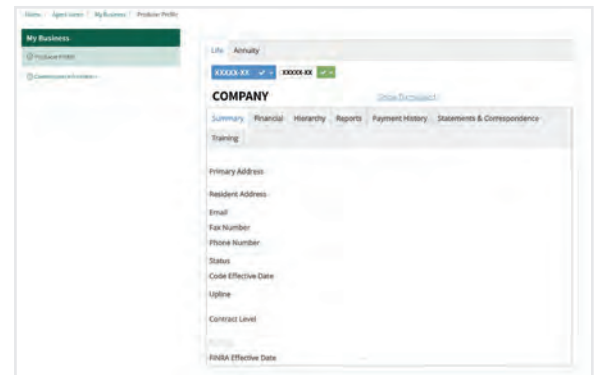
You can also access the Producer Profile through your agent dashboard on the home page.



New users will first need to register the agent code to the website by following [these instructions](#).

Producer Profile Navigation

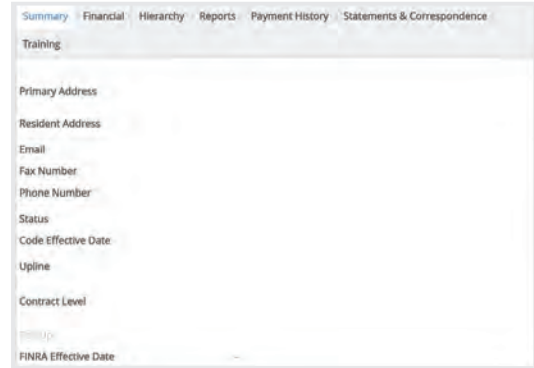
- The Producer Profile tool allows you to access annuity and/or life agent codes
- If you have multiple agent codes, all codes are listed for ease and convenience



Key features and benefits of the Producer Profile

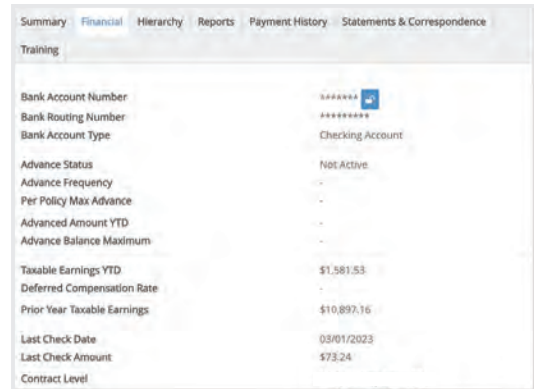
Summary

Access your demographic information such as primary address, e-mail address, and phone number. You may also reference agent code status, upline/hierarchy information, and your agent code effective date.



Financial

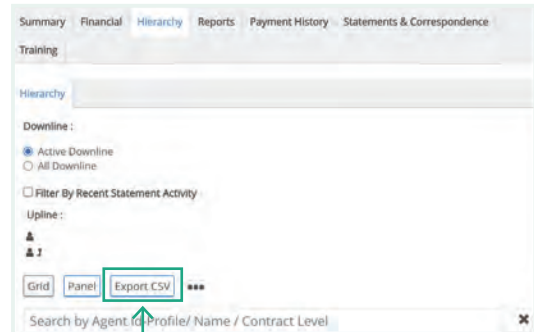
View important financial information such as the bank routing and account number on file for direct deposit, advance commission status, and year to date/prior year taxable earnings.



Hierarchy (if applicable)

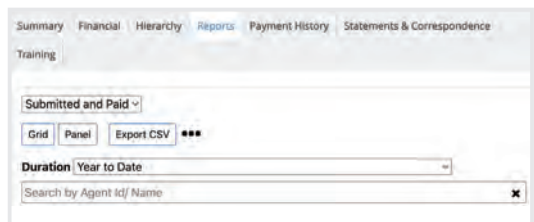
One of the most useful options is the hierarchy tab, where you can view and monitor your downline agents in any status (active, pending, or terminated).

1. Type the name or agent code into the Search field and access specific information for each downline agent including their agent code, contract level, agent trainings, and commission statements.
2. Click "Export CSV" to access an excel spreadsheet that may be filtered and sorted based on your preferences.



Reports (available for Life agents only)

Gain more insights into your business by understanding your submitted and paid premium totals, policy counts, and more. You may view this information for yourself or downline agents in your hierarchy (if applicable).



Key features and benefits of the Producer Profile

Payment history

Whether your pay frequency is on a daily, weekly, or monthly cycle, you can view the amount of compensation received at each cycle that correlates with your commission statement.

The screenshot shows the 'Payment History' tab selected in the navigation menu. Below the menu, there is a table with columns for 'Payment Date', 'Payment Type', and 'Amount'. A single row is visible with the date '03/03/2023', the type 'Electronic Funds Transfer', and the amount '\$80.47'.

Payment Date	Payment Type	Amount
03/03/2023	Electronic Funds Transfer	\$80.47

Statements & Correspondence

Access commission statements based on your pay frequency here. For both Life and Annuity, you may select a PDF version. For Life only, detailed reporting in excel format is also available for accounting purposes.

The screenshot shows the 'Statements & Correspondence' tab selected. It features a search and filter interface with fields for 'Category', 'Date Range', 'From Date', and 'To Date'. Below these fields are buttons for 'Filter', 'Clear', 'View Selected', and 'Export Selected'. A 'View' dropdown menu is open, showing options for 'Create Date', 'Category', 'Document Title', and 'Document Type'. Below the menu, a document card is displayed for '2023-03-03 Life Statements Compensation PDF', with a PDF icon and a download icon.

Training

Confirm status for annuity product-specific trainings, IUL Certification, and Anti-Money Laundering Training (AML)

The screenshot shows the 'Training' tab selected. It displays a table with columns for 'Source', 'Abbreviation', 'Course Name', 'Completed Date', and 'Expiration Date'. A single row is visible for 'AML Anti Money Laundering' with a completed date of '11/01/2021' and an expiration date of '11/30/2023'.

Source	Abbreviation	Course Name	Completed Date	Expiration Date
AML		Anti Money Laundering	11/01/2021	11/30/2023

Questions?

Contact our Agency Services Representatives at 866-322-7068, or via email at NAContracting@sfgmembers.com for assistance on utilizing Producer Profile on NorthAmericanCompany.com



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