AMERICAN NATIONAL®

Guide

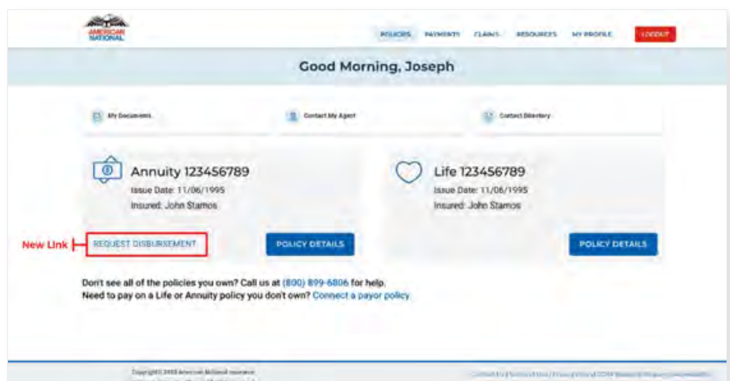
Annuity Disbursement Requests

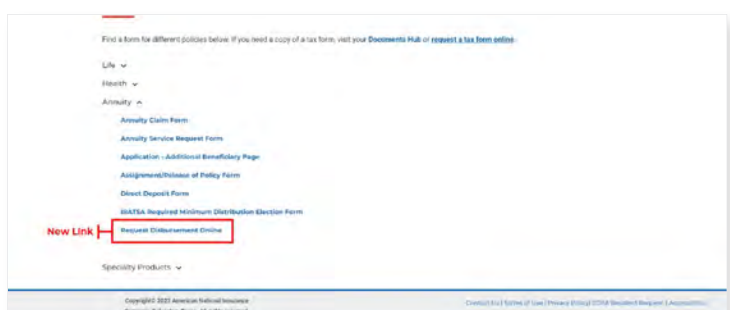
We’re thrilled to announce that our client site now supports digital annuity disbursement requests. Account owners can conveniently initiate their requests directly from the client site homepage or the forms directory. This streamlined process will prepopulate client information and guide them through the necessary questions based on their policy values and type. Say goodbye to paper checks, as clients will receive digital disbursements to their validated bank accounts.

Easy Initiating Process

Clients can kickstart their request right from the client site homepage by clicking on their Annuity Policy Cards. (Please note that payor only accounts are not eligible for request submission.)

Additionally, the request can also be accessed from the Forms Directory. To ensure eligibility, client credentials will be used to determine their ability to submit the form, avoiding any submissions from ineligible clients.

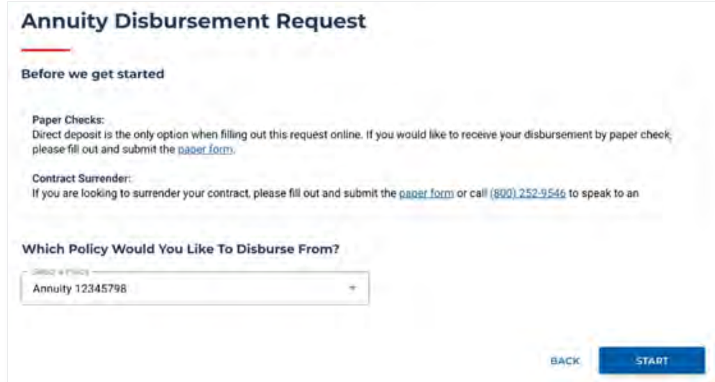




Getting Started Made Simple

Before diving in, clients will be provided with important information about their request, including alternative submission paths (such as paper requests) and a dedicated phone number for assistance.

Clients will begin by selecting the specific annuity policy they are requesting a disbursement for, making it easy for those with multiple policies to submit their requests.

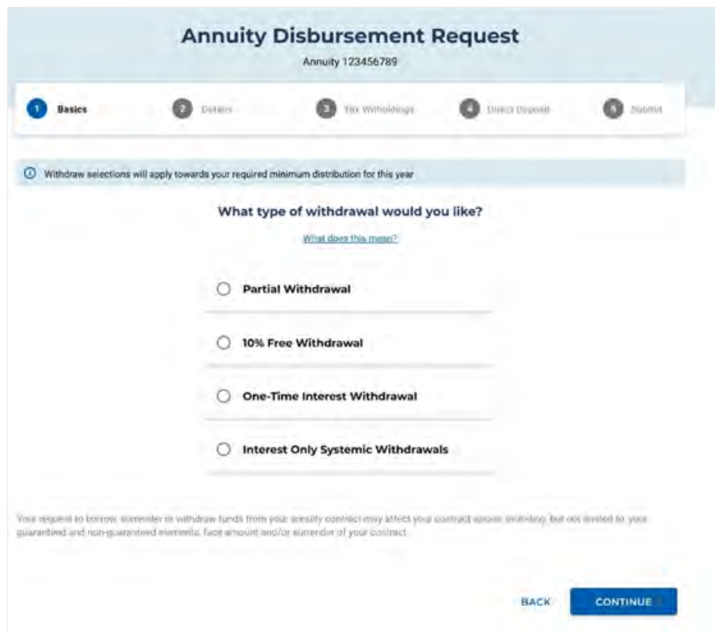


A Convenient and Streamlined Experience

Unlike traditional paper forms, our digital experience is designed to only show clients the questions relevant to their specific scenario. We provide helpful text to explain any unfamiliar terms and display messages to provide additional context when necessary.

By presenting one question at a time and showcasing a progress tracker, we make understanding the content a breeze. Plus, our front-end validation prevents users from submitting requests with invalid data.

For example, clients can't input alphabetic characters in a phone number field or select a date that precedes their submission date.



Review and Confirm with Confidence

With our digital submission process, clients can review their selections before submitting their request. This allows them to spot any inaccuracies, such as incorrect amounts or dates, review their tax withholding percentages, and verify the correct bank account for disbursement.

We've also customized the disclaimer to be specific to the digital experience, ensuring users fully understand the implications of their submission.

Users will not be able to submit the request unless they authorize it.

Submission Complete with Tracking Number

Thanks to our improved experience, users can now track their request with a unique confirmation number. Additionally, they'll receive an email confirming their submission.