

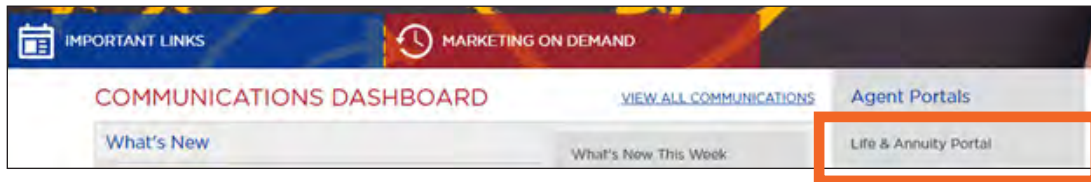


# Software Tooltip Managing Communications

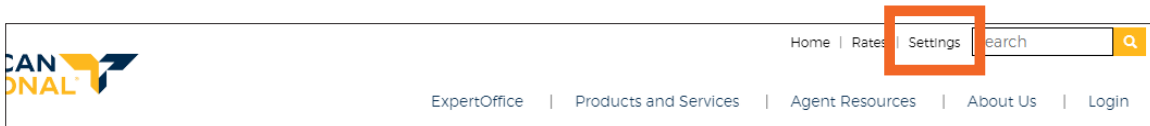
ExpertOffice

## 1 Accessing the Life & Annuity Agent Portal

- A If using the Life & Annuity Distribution website: [lad.americannational.com](http://lad.americannational.com), and are already logged in, proceed to step two.
- B If using Agent Central, select the **Life & Annuity Portal** link located on the Agent Central homepage.



## 2 Select **Settings** at the top of the Life & Annuity Agent Portal.



## 3 Within the agent settings, select **Communication Preferences**.

### Account Settings

<p><b>Change your username</b> Create a personalized username between 7 - 50 characters.</p> <p><b>Change your security questions</b> The security questions will help us identify you if you ever forget your username or password.</p> <p><b>Manage Staff IDs</b> Create and manage already set up Staff IDs for your account</p> <p><b>Change your site settings</b> Update your default site, if applicable.</p>	<p><b>Change your password</b> Update your password to something you can easily remember. Passwords must be between 6 - 15 characters.</p> <div style="border: 2px solid orange; padding: 5px; margin: 10px 0;"> <p><b>Communication Preferences</b> Customize your communication settings. Update and manage your email addresses and phone numbers used to receive notifications on pending business, licensing and any alternate forms of communication.</p> </div> <p><b>Change your 2-step authentication</b> Setup or edit your PingID settings and add/delete devices for your 2- step multi factor authentication.</p>
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# 4

## Communication Preferences

Agents have the ability to personalize communication preferences by customizing emails specifically for Annuity and Life Business. Additionally, this feature provides the option to customize communications for reports and marketing notifications. Agents can easily **enable** or **disable** each of these features.

The screenshot displays a user interface for communication preferences, organized into four main sections, each with an 'ENABLED' toggle switch highlighted by an orange box:

- PRIMARY CONTACT INFORMATION:** Includes an email field with the value 'troye.franklin@barclay.com' and an 'Add Phone (1 new)' button.
- LIFE REQUIREMENTS:** Includes an email field with the value 'troye.franklin@barclay.com' and an 'Add Email (1 new)' button. Below this, there are checkboxes for 'Delivered Per Policy' (Pending, Conditional Issue, Payment Returned) and 'Delivered in one summary report' (Pending, Approval, Conditional Issue, Issued, Declined, Incomplete, Payment, Policy Mailed).
- ANNUITY REQUIREMENTS:** Includes an email field with the value 'troye.franklin@barclay.com' and an 'Add Email (1 new)' button. Below this, there are checkboxes for 'Delivered Per Policy' (Application Submitted, Requirements, Agent Product Training and Q. Training, Policy at Risk of Incomplete, Delivery Requirements) and 'Delivered in one summary report' (Application Submitted, Requirements, Agent Product Training and Q. Training, Policy at Risk of Incomplete, Delivery Requirements, Payment/Funds Received, Active, Incomplete).
- REPORTS AND CORRESPONDENCE:** Includes an email field with the value 'troye.franklin@barclay.com' and an 'Add Email (1 new)' button.
- COMPANY, PRODUCT, & MARKETING NOTIFICATIONS:** Includes an email field with the value 'troye.franklin@barclay.com' and an 'Add Phone (1 new)' button.

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