Annuity

North American Company for Life and Health Insurance®

How to manage your account

We understand how important it is for you to track contract values and make requests online. **Manage My Account** is a client dashboard to track contract values, request changes, and more. With Manage My Account access, you have the ability to make changes online without having to call and wait on the phone for assistance.

Here's what you can do on My.NorthAmericanCompany.com

Update contact information

- Manage changes to your address, phone number, and email address.
- These changes can also be facilitated by your financial professional on your behalf.

Request withdrawals/RMDs

- Request one-time, or scheduled withdrawals, and Required Minimum Distributions (RMDs).
- For withdrawal requests, contracts must be single, natural owner - some limits may apply; contracts with income riders do not qualify for online withdrawals.

Beneficiary changes

- Review current beneficiary designations.
- Beneficiary changes can be made on contracts that are single, natural owner; no trust or non-natural beneficiaries can be named (Ex: estate, trust, charity).
- Sign the request electronically with an e-signature.

Manage allocations

- Review current account allocations and options
- Make changes to account allocations up to 30 days following your contract anniversary date.
- These changes can also be facilitated by your financial professional on your behalf.

Upload documents

- For transactions that require a completed form, or for other contract servicing needs, upload documents via Secure Upload.
- An upload can also be facilitated by your financial professional on your behalf.

Register now

You can access your contract information 24 hours a day, seven days a week including:

- Annual statements
- Contract values including penalty-free withdrawal and RMD amounts
- Transaction history
- Tax documents
- Your contract document

How to register

- Go to My.NorthAmericanCompany.com
- Click the registration button in the upper right
- Input your contract number and SSN then click on next step
- Set up security questions and a password
- Click register and you're done

Questions?

Contact our customer contact team at 866-322-7069 or annuitycorrespondence@sfgmembers.com