

# Producer Authorization FAQ



Producer Authorization gives you and your support staff the ability to make contract changes on behalf of the client, allowing you to provide greater service for contract maintenance and updates.

**Availability of Producer Authorization must be pre-approved by your sales organization. Contact your sales organization to verify if you and your support staff have approval.**

## How does my client provide authorization?

Clients approve authorization differently depending on whether the contract is new or existing.

- **New contracts:** Clients can complete and submit the [Producer Transaction Authorization form](#) with the annuity application.
- **Existing contracts:** Clients have three options to provide authorization for in-force contracts.
  1. Login to MyAthene, go to the Self Service Section and select applicable contracts.
  2. Call the Customer Contact Center at 888-ANNUITY (888-266-8489).
  3. Complete and return the [Producer Transaction Authorization form](#) by email, fax or mail.

## What type of transactions can a producer or support staff handle?

Below are examples of producer-authorized transactions that can be completed over the phone or via Athene Connect.

- Strategy Change Request
- Lock-In Request
- Income Rider Extension Request

## What are the advantages of Producer Authorization?

Producer Authorization helps you ensure contract information is current and can help reduce the risk that clients will miss important deadlines or strategy change opportunities.

In addition, contract maintenance moments can give you an opportunity to increase the value you offer by providing a guided experience throughout the life of your client's annuity.

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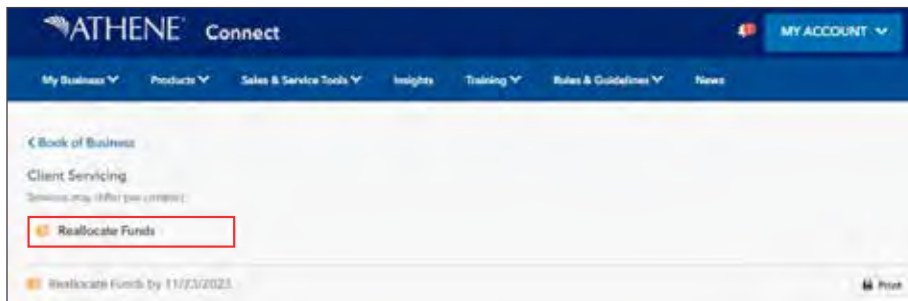
## What do my clients need to know?

Consider these steps to help explain the features and benefits of Producer Authorization.

- Explain the capabilities of Producer Authorization and available transaction types.
- Explain the benefits of Producer Authorization. For example,
  - Saves client time and effort because tasks are completed by the financial professional
  - Potential to maximize product value
  - Helps ensure contract information is up to date

## Q: How can I tell if a client has authorized me on Athene Connect?

**A:** Producer Authorization appears in the Client Servicing section when managing your book of business. These buttons will not be available if your client has yet to authorize you.

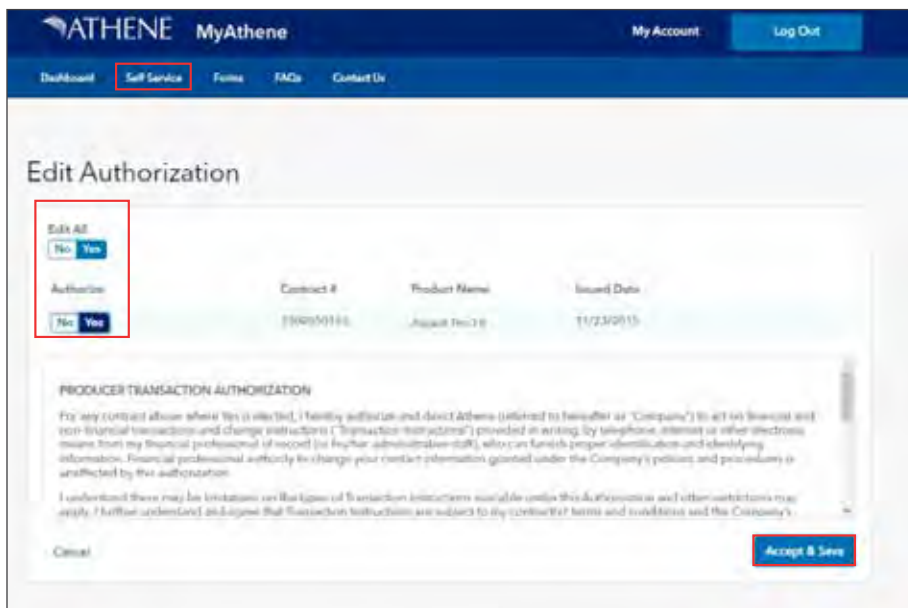


Example of status for Producer Authorization as seen in Client View.



## Q: How does my client provide authorization on MyAthene?

**A:** Clients can access the Self Service section of MyAthene and select Financial Professional Authorization to edit settings. Financial Professional Authorization settings can be changed by your client on MyAthene at any time.



**Q: Can I receive Producer Authorization if I'm not the writing agent?**

**A:** Yes, if you are the active servicing agent listed on the contract. Only the active service agent(s) can be authorized to make producer-authorized transactions.

**Q: What types of contracts are excluded from Producer Authorization transactions?**

**A:** Most contracts are eligible for producer-authorized transactions; however, custodial preference will override Producer Authorization preferences. Producers cannot make or provide instructions for transactions on non-person entity contracts (trust, estate, LLC, etc.).

**Q: Can my client change preferences after choosing Producer Authorization?**

**A:** Yes, your client can change or revoke Producer Authorization any time using the same options available to grant access.

**Q: Can I still make basic contract changes such as an address update to help my client?**

**A:** Yes, any capabilities you already have that support contract maintenance will still be available.

**Q: How soon can I make transactions once my client completes authorization?**

**A:** Immediately when a client authorizes you online via their MyAthene account. For paper authorization forms you'll generally be able to make transactions within 3 to 7 business days after receipt to allow time for processing.

**Q: How can my client submit the completed Producer Authorization form?**

**A:** Producers can help facilitate submission of authorization forms using the Document Upload tool on Athene Connect. Clients can also send completed forms by fax, mail, or email for processing.

- **Email Submission**

- Email completed forms to **Documents@athene.com**
- Include the contract owner's name and/or contract number in the subject line.
- Include only ONE attachment per email.
- **Acceptable** email attachment types include PDF, TIF, DOC, XLS, or JPG/JPEG
- **Unacceptable** email attachment types include HTML LINKS, GIF or PNG. These include images taken from a smartphone that are embedded into the body of the email.
- Do not include text within the body of the email.
- ENCRYPTED emails are acceptable; PASSWORD PROTECTED emails are unacceptable.

- **Fax Submission:** 866-709-3922

- **Mail Submission:**

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