



# ANNUITY E-APP

THE FASTEST WAY TO SUBMIT AN ANNUITY ORDER

Laser App Anywhere makes the annuity order process easier with Annuity e-App!

This add-on leverages iPipeline's premier annuity processing technology right from Laser App Anywhere. Advisors use client data from their CRMs to pre-fill the standardized annuity order entry process across all approved carriers. The back office approves all submissions before the order is placed, adding an additional layer of control.

- Quickly add annuity wizard to Laser App Anywhere
- AFFIRM® makes selling annuities easy for any advisor
- Simplify home office annuity compliance & processing

Annuity e-App gives advisors the ability to choose any approved annuity product with confidence, removes the guesswork from the annuity process, and enables advisors to focus on their client's needs.



## KEY BENEFITS

- Increased advisor annuity adoption & production
- Faster order entry for advisors
- Consistent order entry experience across annuity carriers
- Reduction of rejected orders
- Faster orders issued by the carrier
- Eliminates back office maintenance of carrier & product rules
- Easy setup & deployment



## WHAT SETS ANNUITY E-APP APART?

- The fastest way to complete annuity orders
- Accelerates speed-to-market with new carrier products
- Connectivity to most wealth CRMs
- Dynamic experience based on advisor selections
- Consistent experience across carriers & products
- Configurable suitability & approval capabilities
- User/Approver dashboards built within Laser App
- Built on premiere iPipeline technology

### PROVEN USE

- Over 2 million orders processed on the platform
- 350,000+ unique users
- 4500+ products maintained by the carriers
- \$250B in premium

## INCLUDED COMPONENTS

- Launch directly from Laser App Anywhere
- Annuity entry wizard
- Back office forms included
- e-Signature ready
- Suitability support
- Approver access for order review
- e-Signature (or wet) and electronic submission process
- DTCC order processing

## ADDITIONAL CONFIGURATIONS & INTEGRATIONS

- Custom suitability questions & rules
- Multiple approval levels
- Connection to L&A system
- Custom account & process checks