



AFFIRM® FOR ANNUITIES

STREAMLINED ORDER ENTRY FOR ANNUITY SALES

AFFIRM Annuities is a dynamic compliance and order management system that allows carriers and distributors to cost-effectively increase sales by streamlining and automating the annuity sales process for both fixed and variable annuity products.

A FULLY-COMPLIANT SOLUTION

AFFIRM for Annuities fully utilizes the ACORD Product Profile, allowing carriers to provide financial institutions all of their product rules electronically, using a standard method. Completed applications can be delivered to carriers electronically using the DTCC Insurance Processing Services APP format or the ACORD New Business for Annuity format (NBfA). AFFIRM for Annuities is designed to integrate a carrier's complex product rules with a financial institution's compliance processing to generate transactions that are "in good order." Compliant annuity applications are then electronically submitted to carriers for processing after successfully passing all supervisory reviews required by the financial institution. The platform offers both fill and print along with e-Submit and e-Signature options giving your advisors flexibility with their clients. AFFIRM for Annuities is a proven solution that has increased annuity transactions by as much as 71% annually. AFFIRM Solutions for Annuities integrates carrier's complex product rules and forms requirements with the distributor's point-of-sales order entry system. "In good order" submissions rates are raised to the 100% range.

LEVERAGE TECHNOLOGY TO BROADEN DISTRIBUTION

Increasing the volume of life and annuity applications is critical to the joint success of insurance companies and their distribution partners. Every component of AFFIRM for Annuities is fine tuned to improve the experience of the financial advisor or producer, decrease the cycle time to place business, improve placement ratios and institutionalize the compliance practices of regulated distributors. AFFIRM enables insurance companies to keep their own product and form information updated through accepted industry standards while supporting custom integration with each distribution partner. It provides current status of the application process to each financial advisor and producer right on their desktop, enabling them to spend time pursuing additional business. For the simplification of annuity sales, AFFIRM for Annuities is your solution.

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FEATURES

- User friendly interface for both fixed and variable products
- Comprehensive forms and business rules engine
- Form generation tools
- Single sign-on and authentication
- Complete user administration including roles and privileges
- Support for both New Business and Subsequent Premiums
- Support clients Annuity Book of Business and integrate into replacement compliance workflows
- Support for In Force Transactions (Withdrawals, Rebalance and Fund Transfers)
- Integrate with 3rd Party Vendor and solutions (CT 1035 Yellow Pages)
- Self Service Question Management, Approval Queues and Forms Mappings
- Support for asset allocation and multiple order funding methods
- Support for all riders and service features
- Support for commissions & team selling
- Compliance Management Order routing via electronic application or PDF forms
- Full reporting and audit tracking

BENEFITS

- Fully compliant solution that allows for 100% in good order transactions
- Ensures full compliance both internally and externally
- Control of forms and products
- Full configurable approval workflow
- Straight-through-processing