ANNUITYNET - Order Entry Assistant Guide

Follow the steps below to submit an application through AnnuityNet.

Guide

Protective.

1 GETTING STARTED

Enter your login credentials. Then click Login.



2 CREATE A NEW APPLICATION



NOTE: The screens and or selections options may vary by relationship

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Not a Deposit	Not Insure	d By Any Federal Governm	ent Agency
No Bank or Credit (Jnion Guarantee	Not FDIC/NCUA Insured	May Lose Value

Guide

3 CARRIER/PRODUCT

		Transactions 🐨 Products 🐨 Reports 🐨 Management 🐨 Alerts (17)	My Account 3/24/2020 12:56 PM Set system date:
Edit Annuity Transaction 539378 CarrierProduct			
Steps	Save and Close Validate Detail Reports Add Comm	ent	Previous Next
Carrier/Product	Carrier/Product		
	*Solicitation state	Missouri Montana Nekraska Nekraska	
Choose the solicitation state		New Jorssy New Motico New York	
	*Select carrier	Protective Life	
Select Protective Life as the			
carrier	*Select product	Protective Gwaranteed Income Indexed Annulty Protective Income Builder Protective Income Creator Protective Income Creator Protective Income Creator Protective Income Creator	
Select the Product		Protective Market Defender II Protective Market Defender SBV Protective Secure Saver	
	Wizard	Standard Annuity application wizard	
Wizard – leave the default			
		© 2020 Ebis, Inc.	Previous Nex

PLAN INFORMATION

4

	Prodition My Account 3/24/3020 12:58 Transactions * Products * Reports * Anagement * Alerts (17) *	PM Set system	n date: 🔽 🖍
Edit Annuly Transaction 53378 Pan Carrier/Product Carrier/Product Plan V Individual Couner	Bare and Close Valatere Detail Reports Add Comment Plan1 Account designation [®] Custodial Joint Custodial Joint Custodial Joint Custodial Joint 	Previous	Neat
Choose Account Designation – check with your firm before selecting Custodial.	*Plan type Persion Truet Plan Profit Sharing Plan Rohi Sharing Plan Rohi Sharing Plan Rohi Sharing Plan		
Select Plan Type (Must be in- kind)	*Owner type Other Other Pletson		
Select Owner Type	*E-Signature? ○ Yes ● No *Do you own any life insurance policies or annulies? ○ Yes ● No		
Answer remaining questions			
	0 200 Bik, In:	Previous	Next

TIP! You can save your application at anytime by clicking the SAVE icon at the top of the screen.

5 OWNER INFORMATION

		PystSim My Account 3/24/2020 1:03 PM Set system date:
Edit Annuity Transaction 539378 Folded Oner	Transaction	s 🤠 Products 🌚 Reports 🐨 Management 🐨 Afarts (12) 🐨
Steps	Save and Close Validate Detail Reports Add Comment	Prevas Rest
 Complete the fields with the owner information Answer the two Regarding Owner's questions 	Individual Owner "Name "Gender "Date of bith "Social Security Number "Physical streat address (APO of FPD scoptable) - Required by Patriot Act	Valued Clent Y Polis Fort Mil 5uffs Oldreie Fernie 5uffs 5uffs 002 - 01 - 1122 122 Main Street
TRUSTS:	Maling address (if different from above) Phone number Email address	City Basis Passid Code
If the owner is a Trust we will need the full name of the trust and the date of the trust.	*Citizenship *Type of unsupired government-issued photo I.D used to verify the applicant's identity: *Photo ID #:	United States V Driver's License V NHL121212
Include the Trust Certification form, and or full pages of the trust, and or the registration page, and the signature page.	Regarding Owners "Is there a Joint Owner? "Is the Annultant the same as the Owner?	 NOTE: This screen may vary based on the Owner Type chosen.
		0 200 Bis, In:

6 CONTRACT FEATURES

 Choose the contract features. Contract features may vary by product Choose the desired surrender charge in the state in the state in the state of the state in th		Produin by Annual 1 3/24/2020 1:04 PM Set system date: Transactions Products Reports Management Afterts (17)
applicable) make selections.	 Choose the contract features. Contract features may vary by product Choose the desired surrender charge schedule Under Other Options (if applicable) make selections. 	Image: Search Charge: The Compared Protection Money Back Guarantee Image: Search Charge: The Compared Protection Money Back Guarantee Image: Search Charge: The Compared Protection Money Back Guarantee Image: Search Charge: The Compared Protection Money Back Guarantee Image: Search Charge: The Compared Protection Money Back Guarantee Image: Search Charge: The Compared Protection Money Back Guarantee Image: Search Charge: The Compared Protection Money Back Guarantee Image: Search Charge: The Compared Protection Money Back Guarantee Image: Search Charge: The Compared Protection Money Back Guarantee Image: Search Charge: The Compared Protection Money Back Guarantee Image: Search Charge: The Compared Protection Money Back Guarantee Image: Search Charge: The Compared Protection Money Back Guarantee Image: Search Charge: The Compared Protection Money Back Guarantee Image: Search Charge: The Compared Protection Money Back Guarantee Image: Search Charge: The Compared Protection Money Back Guarantee Image: Search Charge: The Compared Protection Money Back Guarantee Image: Search Charge: The Compared Protection Money Back Guarantee Image: Search Charge: The Compared Protection Money Back Guarantee Image: Search Charge: The Compared Protection Money Back Guarantee Image: Search Charge: The Compared Protecharge Charge Comparee <td< th=""></td<>

7 SELF DIRECTED ALLOCATIONS

Welcome, I Located PROPUBLY NET 4 Answer Frincome	Prodition Hy Account 3/24/2020 1:09 PM 5 Transactions Products Management Products	et system	date:	^
Amend Rinnows Edd Annumby Transaction 33373 Get Decide Absolution Steps ✓ Canter/Product ✓ Plan ✓ Individual Coner ✓ Contract Features ✓ Set Directed Ablocations ✓ Bendiciary 1 ✓ Contract Features ✓ Set Directed Ablocations ✓ Details ✓ Payment 1 ✓ Details ✓ Payment Professional Information ✓ Additional Client Ouestions	Immediations Products Products Products Products Products Start and Close Validation Add Comment * Self Directed Allocations : initial Premium Allocation Allocation Models Set Rest Set Tool Set Tool 100 % Annual Point-to-Point Indexed Strategy (MVA) - Protective Life % Annual Tragger Rate Indexed Strategy (MVA) - Protective Life % Annual Tragger Rate Indexed Strategy (MVA) - Protective Life % Annual Tragger Rate Indexed Strategy (MVA) - Protective Life % Fortal	Previous	Next	
Choose the self-directed allocations. The allocation of the funds must equal 100%	NOTE: Be sure to read the options			
	carefully. For the Protective Indexed Annuity II, three of the options begin with the word "annual" which could lead to incorrect selections.	Previous	Next	

BENEFICIARY DETAILS

8

	Prod/Sim Hy Account 3/24/2020 1:12 PM Set syste Transactions Products	tem date: 📷
Edit Annuity Transaction 539378 Beneficary 1/ Details		
Steps	Image: Save and Close Validate Detail Reports Add Comment Add Spenderlawy Distribution for the formation of the provided of	s Next
 ✓ CarrierProduct ✓ Flan ✓ Individual Owner ✓ Contract Features ✓ Self Directed Allocations ✓ Beefficienty 11 ✓ Details 	Beneficiary 1/ Details *Beneficiary 1/ Details *Percentage 100 % Name Sample Client	
V Peyment 1	First Mi Last Suffix	
Complete the beneficiary fields. If there is more than one primary or contingent beneficiary, the totals must equal 100% for each type.	Entity name Gender • Date of binh Social security number or Tax identification number • Date of binh Social security number or Tax identification number • Odd • Address • Dower • Dower <	
	TIP! Providing full beneficiary details will speed up the claims process.	s Next

9 PAYMENT SECTION



10 PAYMENT SUMMARY

		Predicts Reports Management Alerts (17) Alerts	Set syste	em d
	Edit Annuity Transaction 539378 Paymenta Sammary			
	Steps CarrierProduct Pian Individual Qaner Controt Features Beneficiary 1 Details Payment 1 Details Payment 1 Details Payment summary	Image: Summary Payments Summary Money Source Payment Method New Money / Contribution Brokenge Account State Additional Rayment Total Payments: 590.000.00	Previous	5
Review that the Source, Paym Amount, are a	ne Money nent Method, and all correct			
Add additiona if applicable	l funding sources			
			Previous	8

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INVESTMENT PROFESSIONAL INFORMATION 11

	Prodision My Account 3/24/2020 1:21 PM Set system Transactions Products W Reports Management Alerts (27) Imagement	m date: 🔽 🔨
Edit Annuity Transaction 519378 Edit Annuity Transaction 519378 Investment Professional Information		
Steps ✓ CarrierProduct ✓ Pten ✓ Individual Owner ✓ Order Steatures	Save and Close Values Desite Reports Add Comment: Prendoal P	Next
Enter the Client Number	*Commission basis Option B V *Name "Social Security Number "Split Sample Agent 001 - 22 - 1111 100 % - - - % - - - %	
Choose the Commission basis	Is any participant on this contract or a dependent family member an O Yes I No	
Add the Agents name, Social Security number and Split percentage.	NOTE: It's important to select the correct Commission basis option because it impacts the rate you are paid. If you have questions, contact	
If commissions are being split, add additional agents. The total percentage must equal 100%. Some firms have a	exce backs and the second seco	Next
designated split that must be followed.	TIP! It's important that all agents listed completed the product training prior to solicitation.	

12 ADDITIONAL CLIENT QUESTIONS

	APoint # EXCLOSING		Transactions 👻 Products 👻 Reports		
	Additional Client Questions				
	Steps	Save and Close Validate Detail Reports Add C	Comment .		Previou
	 ✓ Carrier/Product ✓ Flan ✓ Individual Owner 	Additional Client Questions	\$		
	 Contract Features Self Directed Allocations Beneficiary 1 	*Investor's annual income	\$		
	✓ Details ✓ Payment 1 ✓ Details	*Investor's federal tax bracket (for the most recent year) *Investor's investment experience			
	Payments Summary	(consult firm policy for a description of classifications)			
		Client horizon for annuity ivestment (in years)	0		
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13 REVIEW



PAYMENT 1 / DETAILS: 1035 EXCHANGE



PAYMENT 1 / ADDITIONAL DETAILS: 1035 EXCHANGE



For additional support, reach out to your Protective Life Wholesaler.

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