

ALLIANZ LIFETIME INCOME+® ANNUITY

Plan onboarding: what to expect

Allianz is committed to providing an onboarding process that is as simple and seamless as possible. This document outlines what you can expect during the onboarding process and some of the team members you'll be working with.

OUR DISTRIBUTION TEAM IS THERE FOR YOU EVERY STEP OF THE WAY

By now, you're familiar with our dedicated Distribution Team; they will introduce you to our other team members throughout the onboarding process while continuing to support you when needed.

OUR CUSTOMER CARE TEAM

Our customer care team has a dedicated onboarding specialist waiting to work with you to ensure all of your questions are answered and your plan onboarding is as easy as possible.

Your distribution representative will be setting up an introductory call soon.

Your onboarding specialist will work with you on the specific needs and requirements for your plan.

Your distribution representative, who is licensed and appointed with an insurance license in your plan's state of domicile, will also sign these documents.

→ Our team will work with you to build a timeline specific to your needs. If at any time during this process questions arise, **please contact retirement-income@allianzlife.com**

Onboarding specialist key areas of focus:

- 1. Your plan information:** Your onboarding specialist will work to ensure we have all the necessary information about your plan. The objective is to ensure we have captured all plan details accurately. **Some of the information that we will collect or verify during this process is:**
 - Official plan name
 - Tax ID of the plan
 - Official address of domicile for the plan
 - Plan contact name
 - Plan contact phone number
 - Allianz Lifetime Income+® Annuity Indexed Allocation selections
- 2. Application signature:** Your onboarding specialist will also facilitate the signing of required documents. They will pre-fill the documents to the full extent possible and route them for signature electronically. A representative from the plan who is authorized to sign on behalf of the plan will be required to **electronically sign the following documents:**
 - Allianz Lifetime Income+® Annuity **Application for Qualified Retirement Plans**
 - » The authorized signer will simply need to verify the pre-filled information and complete any outstanding items.
 - » If changes need to be made, they can be made within the application, at the time of signing.
 - Allianz Lifetime Income+® **Preliminary Contract Summary Document** (Statement of Understanding)
 - » This document provides a description of how the annuity product works.

Guarantees are backed by the financial strength and claims-paying ability of Allianz Life Insurance Company of North America.

• Not FDIC insured • May lose value • No bank or credit union guarantee • Not a deposit • Not insured by any federal government agency or NCUA/NCUSIF

Products are issued by Allianz Life Insurance Company of North America, 5701 Golden Hills Drive, Minneapolis, MN 55416-1297.

LIA-035 (R-10/2022) Product and feature availability may vary by state and plan. | **For institutional use only.**

(C64712-MVA)