Allianz Life Insurance Company of North America

ALLIANZ LIFETIME INCOME+SM
FIXED INDEX ANNUITY

Allianz annuity conversion packet

Transferring your annuity to an individual retirement annuity

LIA-034 (7/2022)

Contents

Congratulations on taking an important step in planning for your future.

Thank you for choosing Allianz Life Insurance Company of North America (Allianz), a leading provider of annuities and life insurance. We value the trust you have placed in us to help meet your financial goals. Allianz is driven by the vision that our customers should be able to live their lives with confidence and an ability to achieve their retirement goals. That commitment is at the heart of everything we do – from our values-driven, inclusive culture to our innovative financial products, to our responsible investment philosophy.

You can depend on us for the long term.
Our financial strength ratings are among the strongest of any business, in any industry. Founded in 1896, we have over a century's worth of experience in helping our clients, and over 1.2 million Americans rely on us today to help achieve their financial and retirement goals.

Welcome to your Allianz Lifetime Income+℠ Annuity transition packet.
This packet has been created for you because you have chosen to move your Allianz Lifetime Income+℠ Fixed Index annuity out of your 401(k) plan at your employer and into an IRA.

This conversion packet means that we will hold the annuity for you, and that you will now be a direct customer to Allianz Life Insurance Company of North America. It does not mean you are deciding to take income from your annuity, or that you are retired or retiring. Included is information about your Allianz Lifetime Income+℠ Annuity, and the information that was provided to us by your employer sponsored plan. We have also provided instructions on how you can view your account online at **www.allianzlife.com.** Thank you again for choosing Allianz. We look forward to helping you reach your financial goals.

Your Product: Allianz Lifetime Income+℠ Fixed Index Annuity
Your Contract Number: [Customizable fillable here]

Have questions or need assistance?
If you need assistance, please do not hesitate to contact our customer service representatives, who will be happy to assist you, at the following phone number: [Fillable phone field]

Representatives are available from 8:00 a.m. - 5:00 p.m. Central time.

If you have questions about your 401(k), please contact your plan administrator, [Customizable fillable fields for plan name and contact #].

Best regards,

Jasmine Jirele
President and Chief Executive Officer
Allianz Life Insurance Company of North America

Getting started with your individual Allianz Lifetime Income+SM Annuity

FIRST, PLEASE REVIEW YOUR INFORMATION

Because your annuity was originally purchased via your 401(k) plan, some of your information was provided to us by your plan provider.

This section provides all of the information we currently have on file, as received from your 401(k) provider. If you see any line highlighted in yellow, you can expect one of our customer care representatives to be reaching out, for further clarification, to ensure that your conversion and ongoing service are as seamless as possible.

To discuss any of your information, you may also contact us at [Fillable:866.604.7516/800.950.5872]. This same number can be contacted if any of the listed information is inaccurate, or you would like to change some of this information. Alternatively, once you have created your online account on **www.allianzlife.com** (instructions start on next page), you may make any necessary changes there.

Participant (new contract owner)		
NAME: [First Last name]		PHONE: [xxx.xxx.xxxx]
ADDRESS: [Address]		
EMAIL: [Participant email]	LAST FOUR DIGITS OF SSN: [XXXX]	DATE OF BIRTH: [DOB]

PRODUCT NAME: [Name of product]	TAX QUALIFICATION: [Name of product]	CONTRACT NUMBER: [Name of product]
CONTRACT CASH VALUE AS-OF DATE: [XX/XX/XXXX] $[XXXX.XX]	LIFETIME INCOME VALUE AS-OF DATE: [XX/XX/XXXX] $[XXXX.XX]	
CURRENT ANNUITY INDEXED ALLOCATIONS: [Allocations]		
EMPLOYER SPONSORED PLAN NAME: [Plan name]		
BENEFICIARY INFORMATION (NAME AND RELATIONSHIP TO OWNER):		
[Name 01]		[Relationship]
[Name 02]		[Relationship]
[Name 03]		[Relationship]
[Name 04]		[Relationship]
[Name 05]		[Relationship]

Next, create an online account

Because you are now a direct consumer of Allianz, you have access to an online account. We encourage you to create an account, and have included instructions below on how to do so. Once you have created an online account, you will be able to execute common transactions associated with your annuity contract, such as:

- Review and update your personal contact information
- Review your annuity values
- Review and make changes to your interest allocations
- Review and make changes to your beneficiary information
- View past statements and contract documents
- Take a withdrawal from your annuity[1]
- Administer Required Minimum Distributions, if applicable[1]
- Begin taking income[1]

Online instructions

Allianz has put great effort into making our online experience up to par with any other products you encounter online. Here is a simple list of instructions to help you create your online account as a starting point to interact with us in regards to your annuity contract. We make it easy:

To create an account

→ Go to **www.allianzlife.com**
→ Click **"Log In/Register"** at the top of the page, or in the Login section of the page *(see Figure 1)*.
→ Select the **"Register"** button

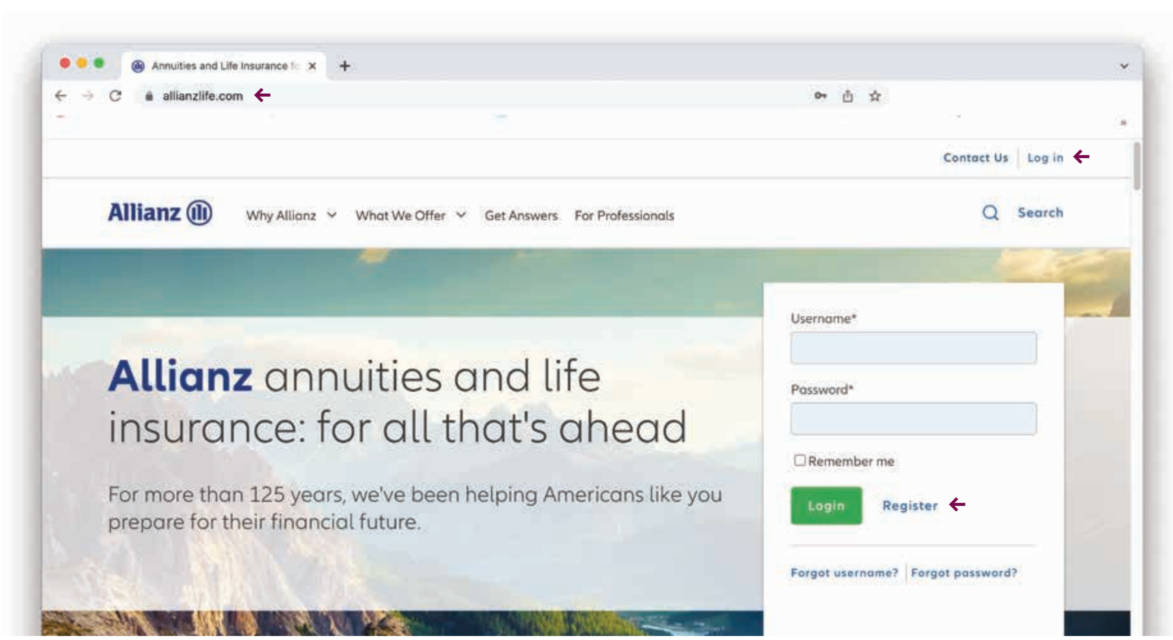


Figure 1

[1] If highlighted information above (as applicable) is not provided at the time of receipt of this packet, additional information may be required for removing funds from the annuity to satisfy annuity regulations.

→ Complete the quick two-page registration process to access your Allianz account online *(see Figure 2)*.

NOTE: All personal information submitted will be kept in the strictest security.

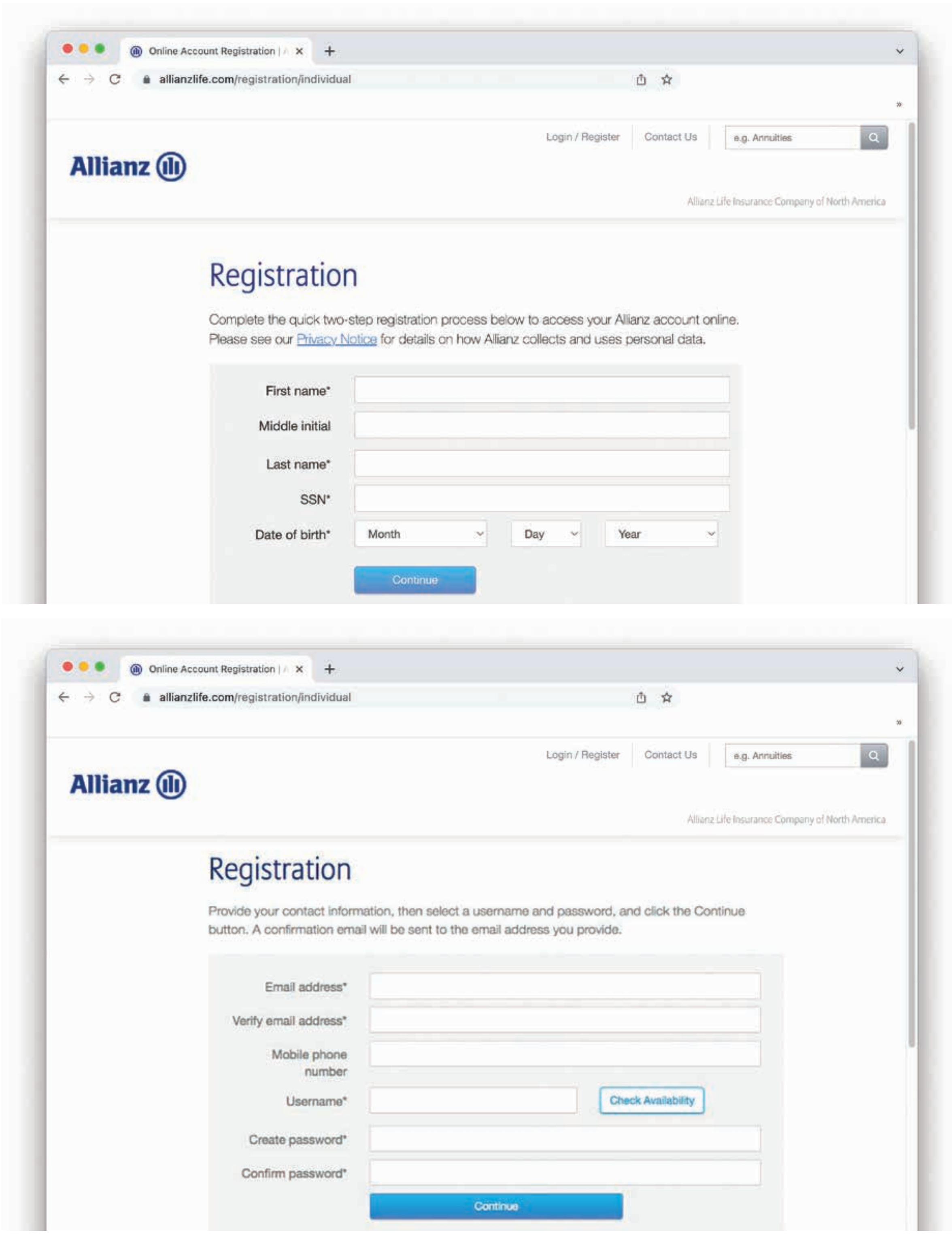
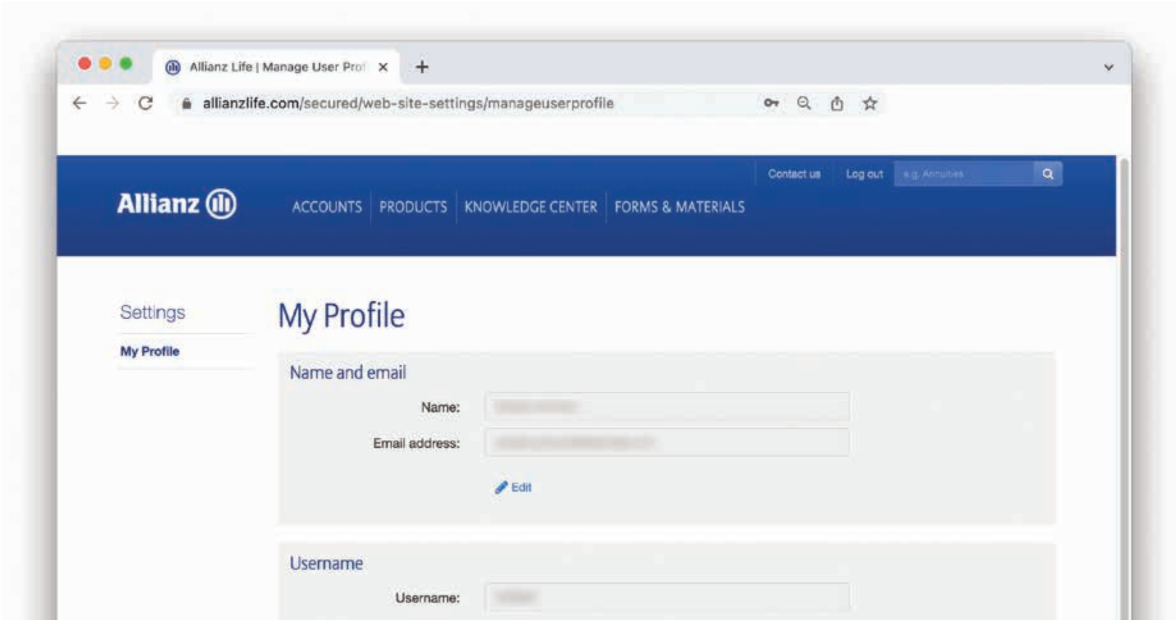


Figure 2



To change or edit your online account profile or delivery preferences

→ After you've logged in, click on your name in the top navigation bar.
→ In the submenu of options, scroll down to **My Profile**.

You will see a series of editable fields for your
- Name and email
- User name
- Password
- Mobile phone number

→ In the submenu of options, scroll down to **Delivery Preferences**. You will be able to manage how communications are provided to you.

NOTE: It may take up to one business day for all information to appear once registered.

To change your contact information

You can view your current contact information and make any desired changes.

NOTE: Your client contact information is different than your profile information. Changing one will not change the other. Any desired changes must be made separately.

Last, reach out for help, if needed

If you are having trouble with your online registration, please feel free to contact a customer service representative between 8:00 a.m. - 5:00 p.m. Central time at **800.950.5872**. This number can also be contacted if you need assistance with your online account, or locating what you need.

Thank you for giving us the opportunity to help you prepare for your financial future. By being true to our commitments and keeping our promises, we believe we make a real difference for our clients. It's why so many people rely on Allianz today and count on us for tomorrow – when they need us most.

Increasing income potential is provided through an automatically included income rider at no additional cost.
Withdrawals are subject to ordinary income tax and, if taken prior to age 59½, a 10% federal additional tax.

Products are issued by:

Allianz Life Insurance Company of North America

5701 Golden Hills Drive
Minneapolis, MN 55416-1297

www.allianzlife.com | 800.950.1962

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