

RIA CONCIERGE DESK

Allianz RIA Concierge Desk overview

When you or your institution needs insurance-access support, our team of securities-registered and insurance-licensed Insurance Consultants are here to help bridge the gap.

After onboarding, we help advisors understand today's fee-based Allianz® annuities and how they can support specific client needs. If a potential fit emerges, advisors can autonomously submit and track annuity case referrals through the Allianz Annuity Portal – knowing that our team is here to work with them, every step of the way.



SEE A SIMPLIFIED VERSION
of how we work together (on back) →

RIA Concierge Desk members are securities-registered with the Leaders Group, Inc., member FINRA/SIPC.

Allianz Life Insurance Company of North America and Allianz Life Financial Services, LLC are not affiliated with the Leaders Group, Inc.

This content does not apply in the state of New York.

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The Allianz RIA Concierge Desk makes it easy to offer modernized, fee-based annuities.

After onboarding and setting up an AllianzLife.com account, here's how we can work together:

STEP 1: Submit a prospective case



Log in to AllianzLife.com and go to the Advisory Annuity Portal, and enter your client's details



Receive an annuity solution referral within 24 hours

When a referral is approved:

STEP 2: Work with RIA Concierge Desk on requirements and other details



The RIA Concierge Desk will:

- ✓ Complete the application
- ✓ Work with you to gather requirements
- ✓ Direct the facilitation of transfer and exchange requirements

... all with the goal of bringing the case to issue. (You will receive real-time status updates and change alerts.)

When a referral is issued, we will:

STEP 3: Affirm delivery of contract and receipt of PDF copy



Set up a meeting with new firm's back office to provide a site tour, share how to manage books of business, and more.



FedEx welcome packets to your clients



Email a PDF of the contract to you

TAKE THE NEXT STEP

→ Email the RIA Concierge Desk with questions at contact@allianzriasupport.com.

Or start onboarding with Allianz through your Allianz Advisory Solutions team member today:



Find your dedicated team member



Independent advisors: Use our onboarding form (optional)

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