corebridge financial

How to do business

Distribution Partner Guide

Obtaining product and policy information

- The Connext www.corebridgefinancial.com/connext website contains product and policy information for the following fixed and index annuity products (non-NY):
  - **Power Index Advisory**
  - **Assured Edge Advisory**

Obtaining illustrations

- Customized illustrations can be run by logging into Connext and from the homepage, under Start an Application, click on Annuity Illustrations.

Ordering forms and marketing materials

- New Business and Post-Issue forms are available on the Forms Depot website of Connext.
- Marketing materials are available for downloading on Connext Annuity Consultant Desk and posted on the Forms Depot website for ordering or downloading.

Licensing and contracting

New agent appointment

- Email paperwork submission: IMOBGA_PendReport@corebridgefinancial.com
- Questions or escalations: IMOBGA_PendReport@corebridgefinancial.com
- Reference the instructions on the IMO/OID Channel Licensing & Contracting Deck for Advisory for filling out onboarding paperwork

NAIC Suitability Model product-specific training

Power Index Advisory and Assured Edge Advisory NAIC product training is available on Quest CE and RegEd.

- **Power Index Advisory**
  Core course ID: J5281PA
  Course Name: Power Index Advisory training
- **Assured Edge Advisory**
  Core course ID: F5705AD
  Course name: Assured Edge Advisory training

New business submission

Regular mail: (USPS (Post Office) First Class, Express & Priority)

- **Without Premium & Service Forms**
  American General Life
  Attn: Annuity Service Center
  P.O. Box 2708
  Amarillo, TX 79105-2708
- **With Premium (NEW)**
  American General Life
  Attn: Annuity Service Center
  P.O. Box 100330
  Pasadena, CA 91189-0330

Overnight mail: (UPS/FedEx/DHL)

- **Without premium & service forms**
  American General Life
  Attn: Annuity Service Center
  1050 North Western Street
  Amarillo, TX 79106-7011
- **With premium (NEW)**
  JPM Chase-AGL 100330
  2710 Media Center Drive
  Building #6, Suite 120
  Los Angeles, CA 90065-1750
- **Wiring instructions:**
  American General Life Insurance:
  Bank Name: JP Morgan Chase, New York, NY
  Attn: Cash Management
  525 W. Monroe, 6th Floor
  Chicago, IL 60770
  ABA Number: 021000021
  Account Name: American General Life Insurance
  Account Number: 05105676
- **Contact the Annuity Service Center** at 888-438-6933, option 1 for New Business related questions.
- **Fax application submission:** 713-620-3829
- **Email** (paperwork only): AnnuityServiceCenter@corebridgefinancial.com

Pending contract status and Inforce contract information

- Pending contract status and inforce contract information will be available on the Connext website.
- **Fax:** 888-620-3829.
- **Email Inquiries**: annuityservicecenter@corebridgefinancial.com
- Contact the Annuity Service Center at 888-438-6933, option 1, for additional pending contract status and inforce contract information.

Follow these steps to connect an RIA/IAR to an OID written annuity contact

Where an Agency or Broker-Dealer is acting as an OID for certain Registered Investment Advisor Firms, the following documentation should be in place in the following order prior to or along with application:

Step 1: RIA Investment Advisor Onboarding Agreement (form required if new to Corebridge Financial)

Step 2: Registered Investment Advisor Authorization

Registered Investment Advisor Authorization

- Allows RIA/IAR to be attached to the annuity policy so that they can support client with policy changes and service. Form will be included in the order entry process.
- To add an RIA to an existing advisory annuity, fill out the Registered Investment Advisor Authorization form and submit to: AnnuityServiceCenter@corebridgefinancial.com

Technology Integrations for RIAs

- We are making strategic alliances with industry leading providers and technology platforms to offer Portfolio, Practice Management, and Reporting capabilities.

Advisory Fee Systematic Withdrawal Program* (Optional)

- Allows RIA/IAR the ability to have Advisory Fees withdrawn from their client's annuity contracts and paid directly to their firm. The program is an option for RIA/IARs who are not taking fees from a separate account.
- To activate the functionality to allow for a program to be established your firm must sign the Advisory Fee Systematic Withdrawal Authorization form and submit to: AnnuityServiceCenter@corebridgefinancial.com

* Corebridge Financial obtained an IRS PLR allowing advisor non-qualified fee withdrawals. *IRS has not granted fixed annuities a PLR for products such as Assured Edge Advisory

For questions contact the Annuity Consultant Desk at 888-438-6933, option 2 or reach out to your dedicated Corebridge Financial Wholesaler for an IMO/BGA Annuity Territory Map

Annuities are issued by **American General Life Insurance Company** (AGL), Houston, TX. Issuing company AGL is responsible for financial obligations of insurance products and is a member of Corebridge Financial, Inc. Guarantees are backed by the claims-paying ability of the issuing insurance company. AGL does not issue products in the state of New York.

corebridgefinancial.com

Not FDIC or NCUA/NCUSIF Insured
May Lose Value • No Bank or Credit Union Guarantee Not a Deposit • Not Insured by any Federal Government Agency

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