

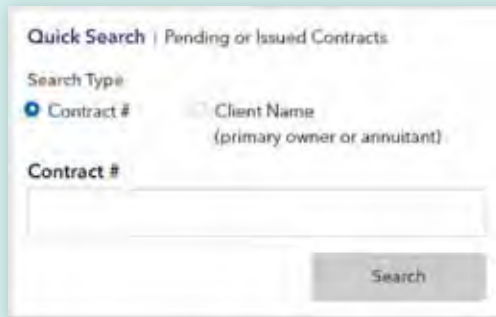
# Access client tax documents on Athene Connect

Follow the steps below to access client tax documents on Athene Connect.

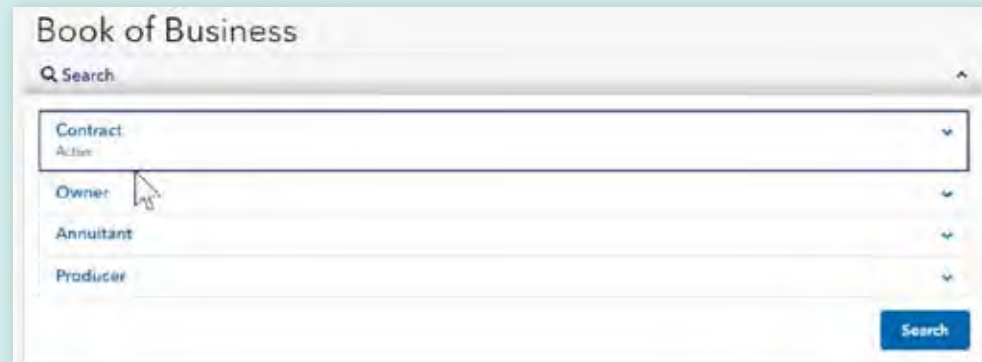
**1** Log into the Athene Connect website at [www.athene.com/producer/login](http://www.athene.com/producer/login)

**2** Search for tax documents by contract or client name using one of the following locations:

a. Quick Search Dashboard



b. Search section on your Book of Business report



c. Hyperlink from any of the following:

- i. Recent Business Issued report grid
- ii. Production Summary
- iii. Alerts report grid
- iv. Commissions Statements
- v. Downline Commissions
- vi. Any reports selected from the Downline Search page

**INVESTMENT AND INSURANCE PRODUCTS ARE:**

• NOT INSURED BY THE FDIC OR ANY FEDERAL GOVERNMENT AGENCY • NOT A DEPOSIT OR OTHER OBLIGATION OF, OR GUARANTEED BY, THE BANK OR ANY BANK AFFILIATE • SUBJECT TO INVESTMENT RISKS, INCLUDING POSSIBLE LOSS OF THE PRINCIPAL AMOUNT INVESTED

3

Open the Client View page using one of the following methods:

- a. Find the client on a report grid and select the client name.
- b. From the Application Details/Contract Details page, select the client name.

### Quick Search

Search for pending or issued contracts by client name (primary owner or annuitant only) or contract number.

Client Name ▾ Colorado Search

8 results for Colorado

	Contract #	Owner Name	Annuitant Name	Product	Status
<a href="#">Preview</a>	33 [REDACTED]	Colorado, Don	Colorado, Don	Performance Elite Plus 7	Active
<a href="#">Preview</a>	33 [REDACTED]	Colorado, Don	Colorado, Don	Athene MYG 5	Pending
<a href="#">Preview</a>	33 [REDACTED]	Colorado, Max	Colorado, Max	Athene Agility 10	Active
<a href="#">Preview</a>	33 [REDACTED]	Colorado, Max	Colorado, Max	Athene Amplify 2.0 NF	Active

### 33 Active

Type	Product	Issue Date	Tax Qualification
Indexed Annuity	Performance Elite Plus 7	12/20/2021	IRA

**Owner(s)**

Colorado, Don

Male

DOB: [REDACTED]

[REDACTED] Parkway

[REDACTED] IA 50 [REDACTED]

[View Owner Details](#)

**Annuitant(s)**

Don Colorado

Male

DOB: [REDACTED]

[View Annuitant Details](#)

**Beneficiary(ies)**

Primary

100% - Ben [REDACTED]

- 4 From the Client View page, you will see a Tax Documents section that houses any available Athene tax documents you have access to for that client.



The screenshot shows a client profile for "Adams, David". Under the "Contact Info" section, the following details are visible: Email: testing@[redacted].com; Phone: 515-111-[redacted]; Mailing Address: [redacted] it, Olympia, WA 98[redacted]. Below this is a "Tax Documents" section with the text: "Tax documents are only available for the primary contract owner."

**Note:** You will only be able to see client tax documents for contracts you are actively servicing.

- 5 To access the tax documents, you must complete a Multi-Factor Authentication (MFA) by selecting the 'Get Tax Documents' button and following the MFA steps.



The screenshot shows the "Tax Documents" section with the text: "Tax documents are only available for the primary contract owner." Below this text is a button labeled "Get Tax Documents".

**Note:** The MFA only needs to be completed once per login session.

- 6 Once the MFA has been successfully completed, you can download any available tax document. The client's mail preference will also be listed on this page.

**Tax Documents**

Tax documents are only available for the primary contract owner.

Client's Current Delivery Preference: Mail

**Tax documents for the most recent year are required to be mailed by January 31st. Documents will display online as soon as they are available.**

Tax Year  
2022

Type	Tax State	Contract #	
5478	Iowa	331 [REDACTED]	<a href="#">Download</a>
1099-R	Iowa	33 [REDACTED]	<a href="#">Download</a>

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