

SUITABILITY PRE-CHECK

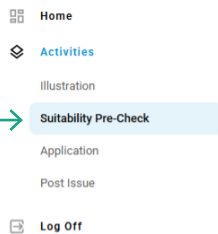
Your first step to start an application on Annuity e-Biz

- ✓ **Pre-approval** - get approved before you meet with the client
- ✓ **Save your time** - e-Biz platform helps reduce NIGO (not in good order)
- ✓ **Save client time** - e-Biz will be 70% complete, client signs once
- ✓ **Approval confirmation** - receive a confirmation email of the approval

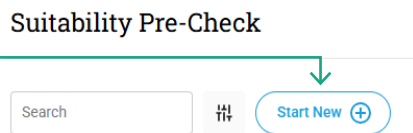
How it works

1. Select Suitability Pre-Check on the activity page.

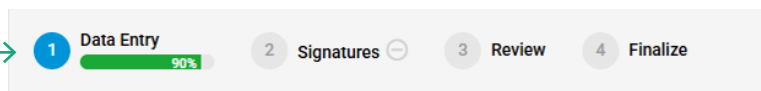
A list of available products will pop up.



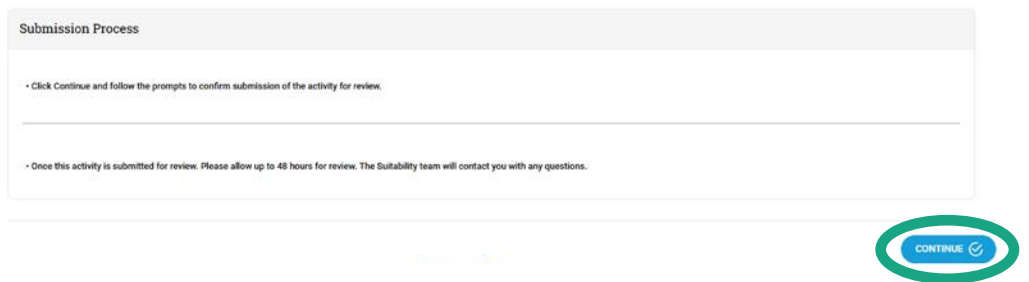
2. Once the product is selected, start the Pre-Check process by clicking "Start New."



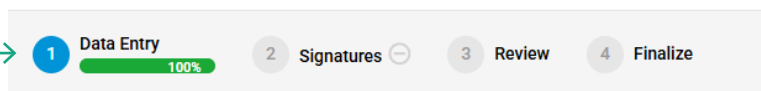
3. In the upper left navigation, Pre-Check shows you how far you are in the data entry; 100% means you're ready to submit.



4. The "Acknowledge" link will show any outstanding requirements. If there are no requirements missing, "Data entry has met requirements" will display and you can move to "CONTINUE".

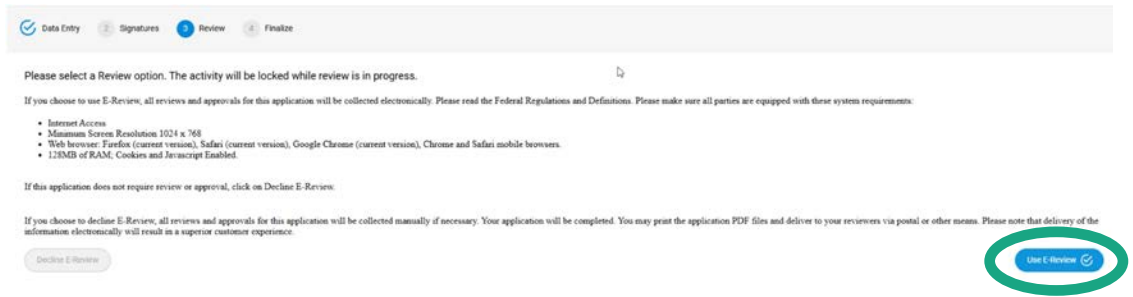


5. The status bar should now show 100% complete and you are ready to submit the request.

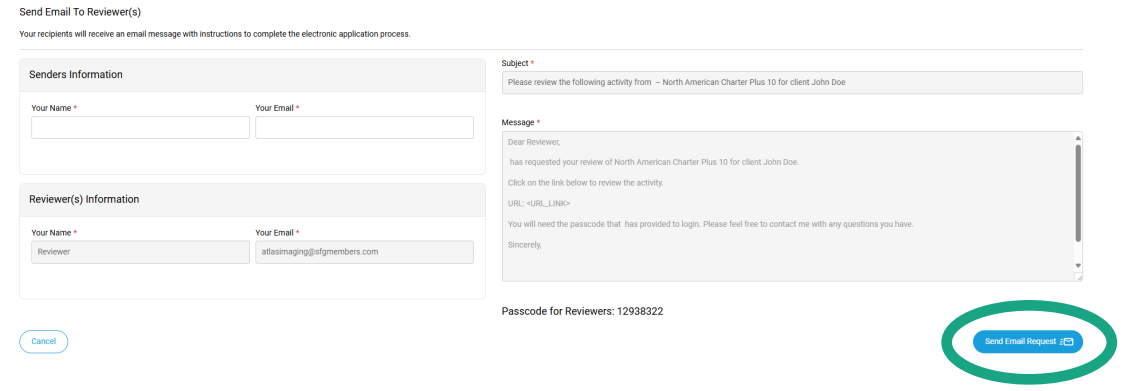


6. Now that data entry is complete, you're ready to submit the request to a reviewer by simply clicking on the "Use E-Review" button.

(Note: when using Suitability Pre-Check, the signature step is skipped.)

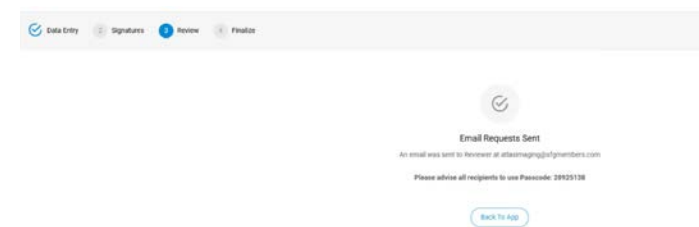


7. After you send the request to E-Review, a final confirmation screen appears and you will need to enter the "senders information" and then click on "Send Email Request" in order for the submission to be complete.

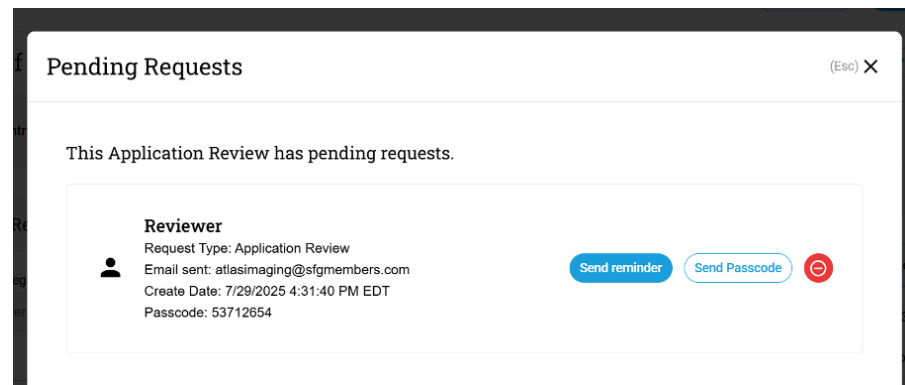


8. A confirmation screen confirms that an email has been sent to a reviewer. Click "Back to app."

Your assigned reviewer will respond within 48 hours.



9. When the pop-up appears, select the "X" in the top right corner to close the pop-up. No reminder is needed, and the passcode was already sent when you sent it to E-review.



Questions about Pre-Check?

Contact North American's Suitability review team at **877-858-1364**.



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