

Coming July 25! New and improved suitability review forms.

You asked, we listened!

In an effort to make doing business easier while maintaining a strong suitability program, we're introducing new and improved suitability review forms in all states except Florida and New York. Our new forms have been redesigned to provide additional clarity and help you submit applications "in good order."

Check out these enhancements

Along with the enhancements shown below, the new forms request additional information up front to reduce the need for client letters and other documentation. We've also eliminated several questions that are similar in nature and asked in multiple places.

- **New - Rate Comparison Worksheet:** This new form will be included in all fixed indexed annuity application packets, including electronic applications (e-apps). It was created to help reduce the need for additional documentation after the application is submitted.
- **Improved - Customer Identification and Suitability Confirmation Worksheet:** There are more options to help clarify the sources of funds and income. We've also enhanced the Financial Section to make it easier to complete.
- **Improved - Product Comparison Worksheet:** We've added questions that are more tailored to individual products and will help reduce the need for additional documentation.

Important processing dates to keep in mind...

The new and improved suitability review forms (Ver. 06/20) will be available on [Athene Connect](#) beginning **July 25, 2020** and should be used immediately.

- Applications signed on or before **July 24, 2020 AND** received before market close (**3 p.m. CT**) on **August 7, 2020** will require the old forms listed above.
- Applications signed on or after **July 25, 2020 OR** received after market close (**3 p.m. CT**) on **August 7, 2020** will require the new forms listed above.

Please note: For applications submitted on AnnuityNet or Affirm (where no sign date was provided), the application signed date is the date the electronic order is submitted to your back office for final review.

Applications with outdated or missing forms that do not fall within the guidelines listed above will be considered "not in good order." Be sure to use up-to-date materials when offering Athene annuities.

Learn more about what's changed

Unable to attend yesterday's webcast? Don't worry, there's another one coming soon.* Simply click the register button to attend on **Tuesday, July 23 at 10 a.m. CT**. This webcast will walk you through many of the enhancements and give you a clearer understanding of what will be expected when submitting an Athene application. Come with questions — we'll have time for a short Q&A session following the presentation.

[Register now!](#)

*Recordings of our live webcasts will also be available in our "[On-Demand Library](#)" on Athene Connect. Please allow 2-3 days business days for webcasts to be posted.

For additional information, and to help you have a better understanding of Athene's considerations during the suitability review process, please familiarize yourself with our revised producer guidelines and helpful tips:

- [Suitability Guidelines for Producers](#)
- [Athene's Position on Annuity Suitability](#)
- [A step-by-step guide to completing Athene's suitability worksheet](#)
- [A step-by step guide to completing Athene's product comparison worksheet](#)
- [Trust tips for completing Athene's suitability worksheet](#)

Thank you for your business. At Athene, we believe the power of unconventional thinking can help take you to the next level. For product and sales support, please contact the best Sales Desk in the business at **888-ANNUITY (266-8489)**.



Get Insights

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