Annuities

Annuity Producer Portal

To access the Annuity Producer Portal, you'll need to create a new online account or connect with your existing account.

- If you already have an online account, skip to the **Access Services With An Existing Account** section on page 10.
- From the Annuity Producer Portal, you can **Manage Your Online Account** at any time.

Create an Online Account

Producers licensed to sell with The Standard, producer assistants and back-office staff can log into our Annuity Producer Portal to view your Book of Business. The Standard uses secure, online accounts to protect your data and provide access to your Annuities Book of Business.

Get Started

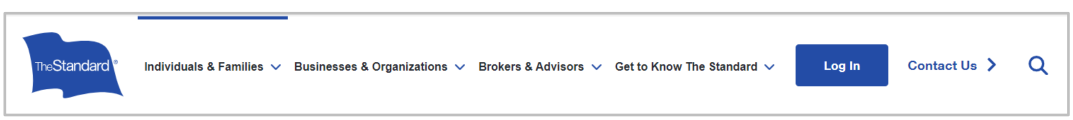
*Please allow **15** minutes for initial setup*

You will need the following items to create a new online account:

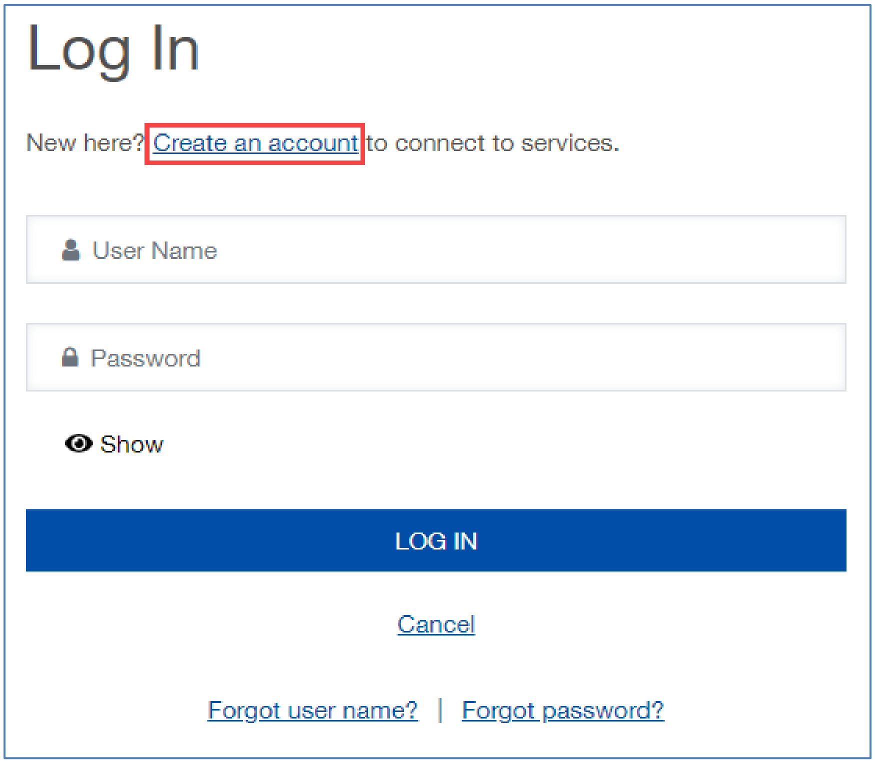
- A computer, or other device, with access to the internet and to your email
- Your 10-digit Producer ID or Agency ID
- The last five digits of the SSN or TIN associated with the Producer ID or Agency
- Your email address and your phone number

Create an Account

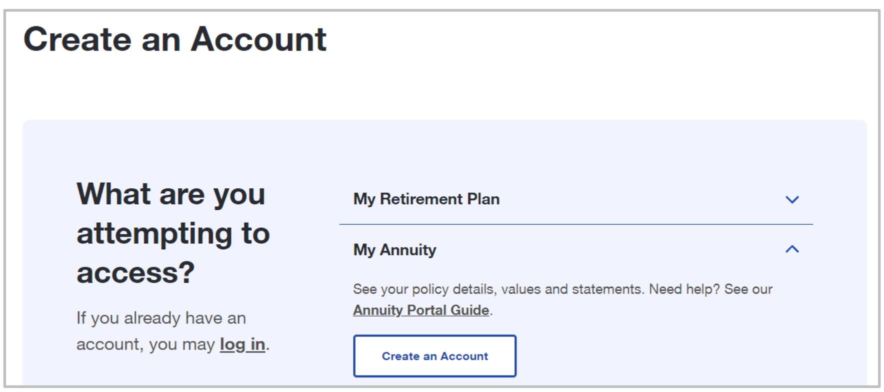
1. Open a browser window, such as Chrome or Safari.
2. Go to standard.com/annuities to open The Standard's annuity homepage.
3. In the upper right corner, select **Log In**.



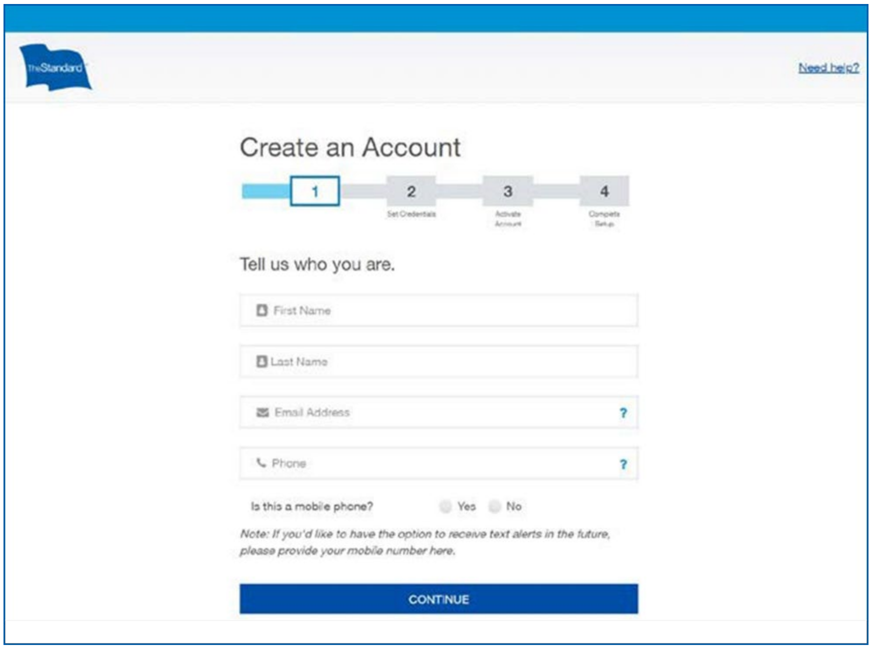
4. On the Log In page select **Create an account**.



5. Under the **My Annuity** section, select **Create an Account**.

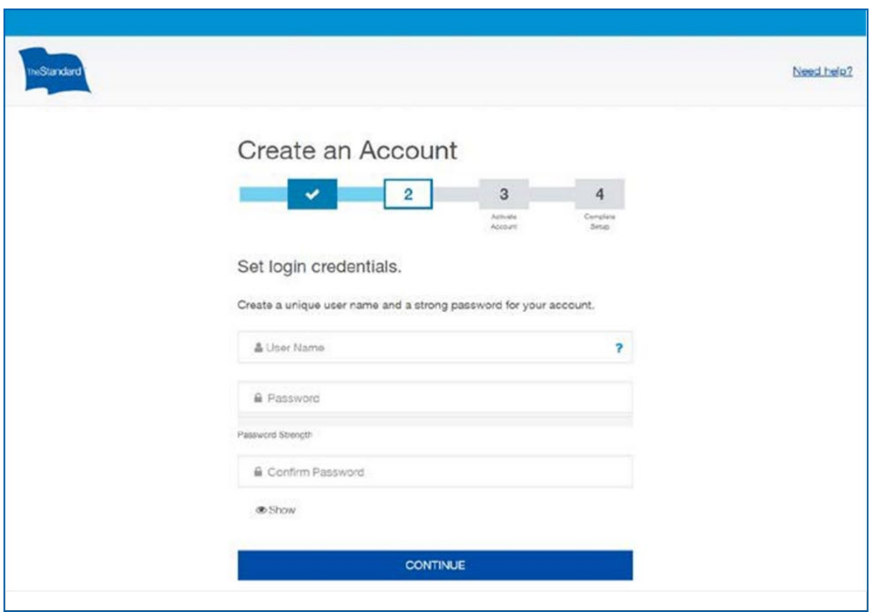


6. On the Create an Account page, enter your contact information and select **CONTINUE**.



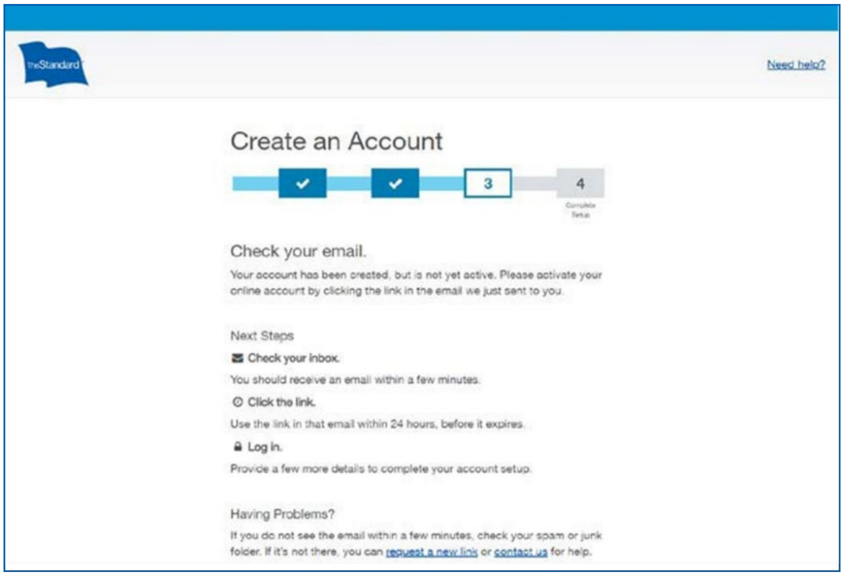
If you'd like to receive text alerts in the future, please be sure the phone you enter here is a mobile phone.

7. In Step 2, create an account **User Name** and **Password**, and then select **CONTINUE**.

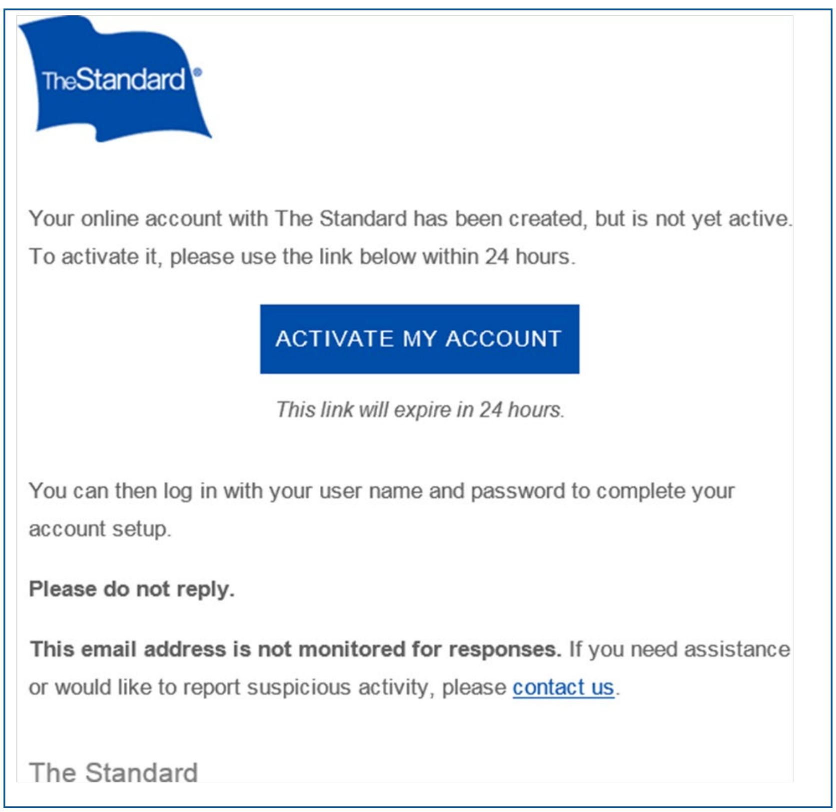


- Your user name must have 7 – 20 characters, no spaces and no @ symbol.
- Your password must have at least 10 characters, a lower-case letter (like a), an upper-case letter (like A), and a number or special character (like 1 or $)

Once you select **CONTINUE**, you will receive an activation email. If you don't receive your email in 5 - 10 minutes, please check your Spam folder.

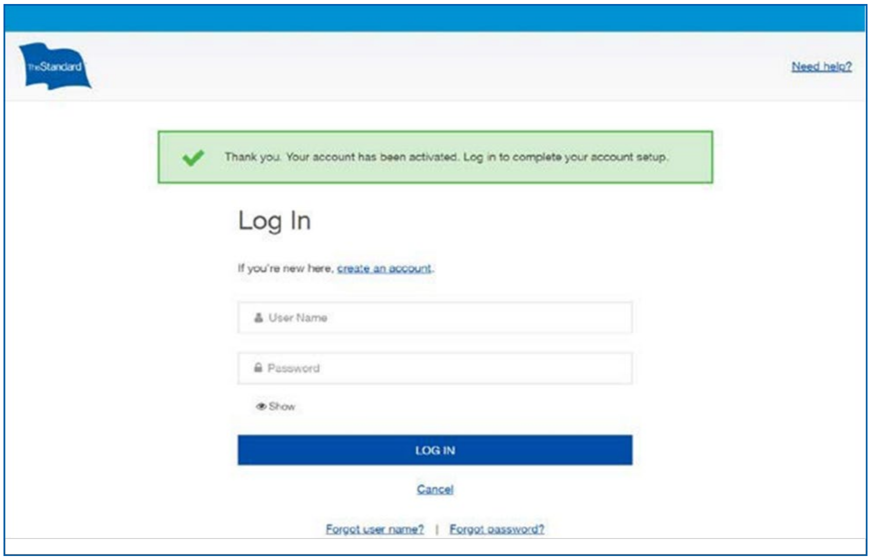


8. Open the Activate Your Online Account email from The Standard <verify@standard.com>, and then click the **ACTIVATE MY ACCOUNT** link. You must click the link within 24 hours to verify and activate your account.

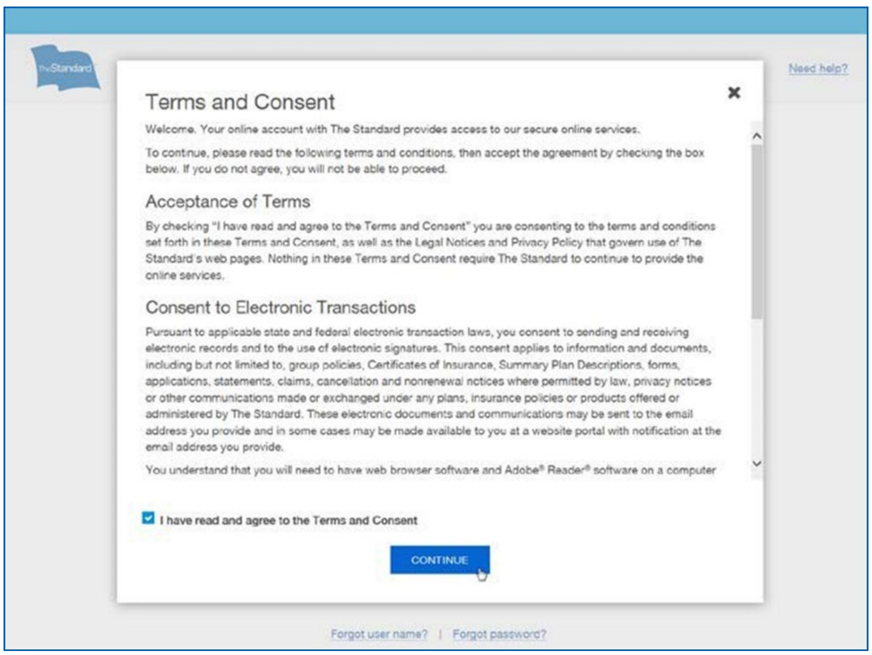


Once you've clicked the **ACTIVATE MY ACCOUNT** link, you'll be taken to the Annuity Portal login page. Here, complete your account setup and connect to the Annuity Portal.

9. In the Log In form, enter your **User Name** and **Password**, and then select **LOG IN**.



10. After logging in, review the Terms and Consent statement, click to acknowledge **I have read and agree to the Terms and Consent**, and then select **CONTINUE**.



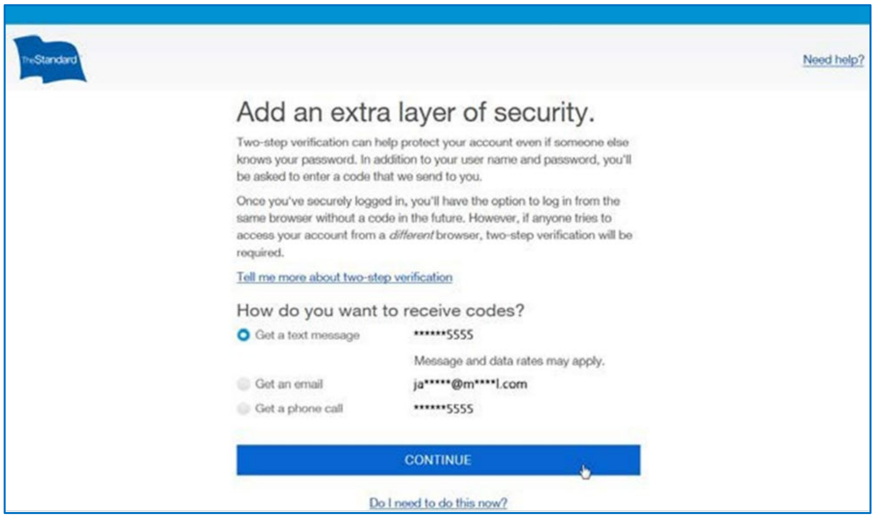
11. Next, you'll set up an additional layer of security called two-step verification.

This feature requires two things when you log in to access your account from an untrusted browser:

- Something you know (your user name and password)
- Something you have (your phone or computer).

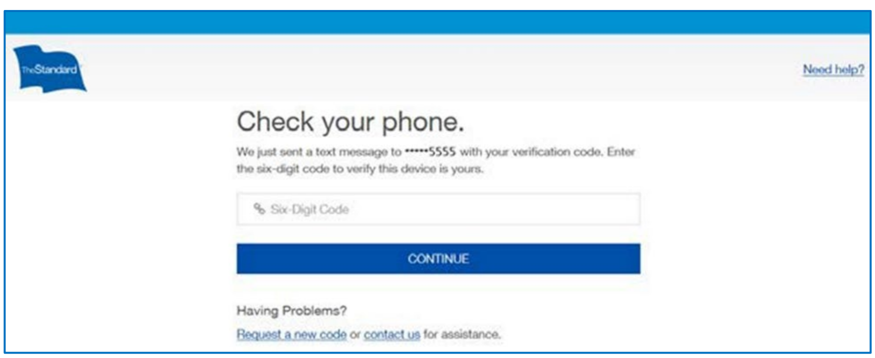
You will select and confirm how you will receive the verification code that is sent to your phone or email and enter it during the login process.

12. Click to select your method to receive the two-step verification code when you log in to your account, and then select **CONTINUE**.

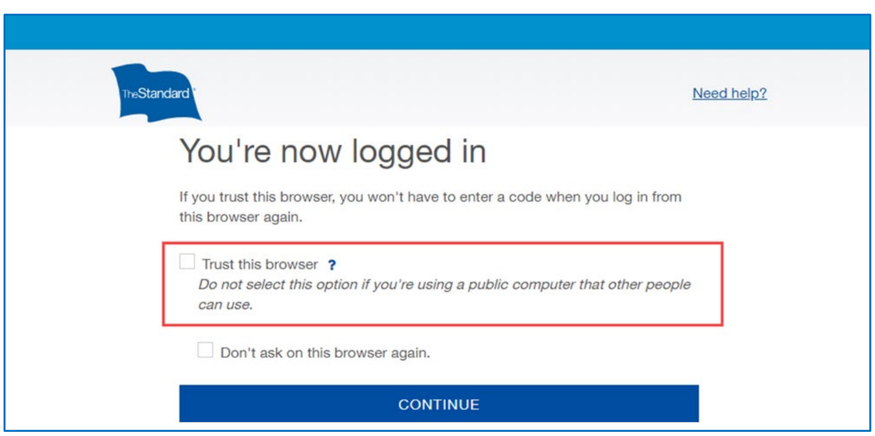


Text messages will be available as an option only if you entered a mobile phone number at the beginning of this process. If you did not enter a mobile phone number, you may choose to receive an email or phone call.

13. Based on your selection, check your phone or email for the six-digit verification code. Enter the code to verify your device, and select **CONTINUE**.



14. If you trust the device used to log in, click **Trust this browser** and select **CONTINUE**.



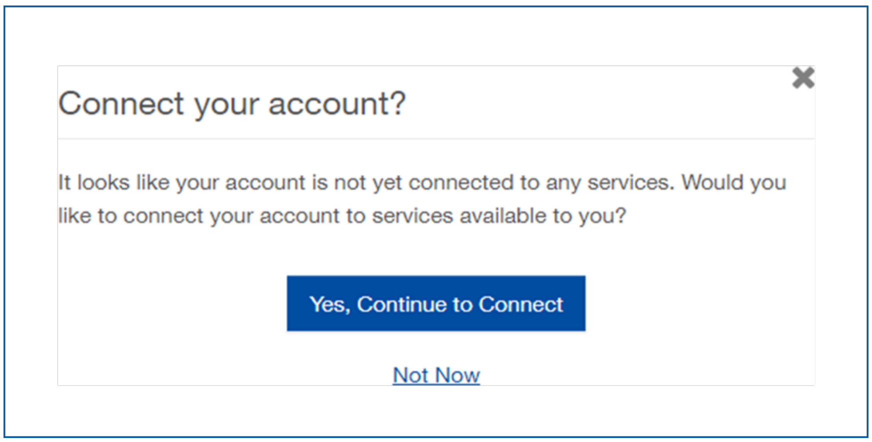
Designating a device as trusted is helpful when it is frequently used to log in. It allows you to log in from that device without having to enter a two-step verification code.

However, in certain circumstances, even when a device is trusted, you may be prompted to enter the verification code.

Situations that may trigger the verification code include:

- Changing or updating the browser software or the equipment used to access our services
- Deleting cookies from your browser or device
- Signing in from an unrecognized location or IP address

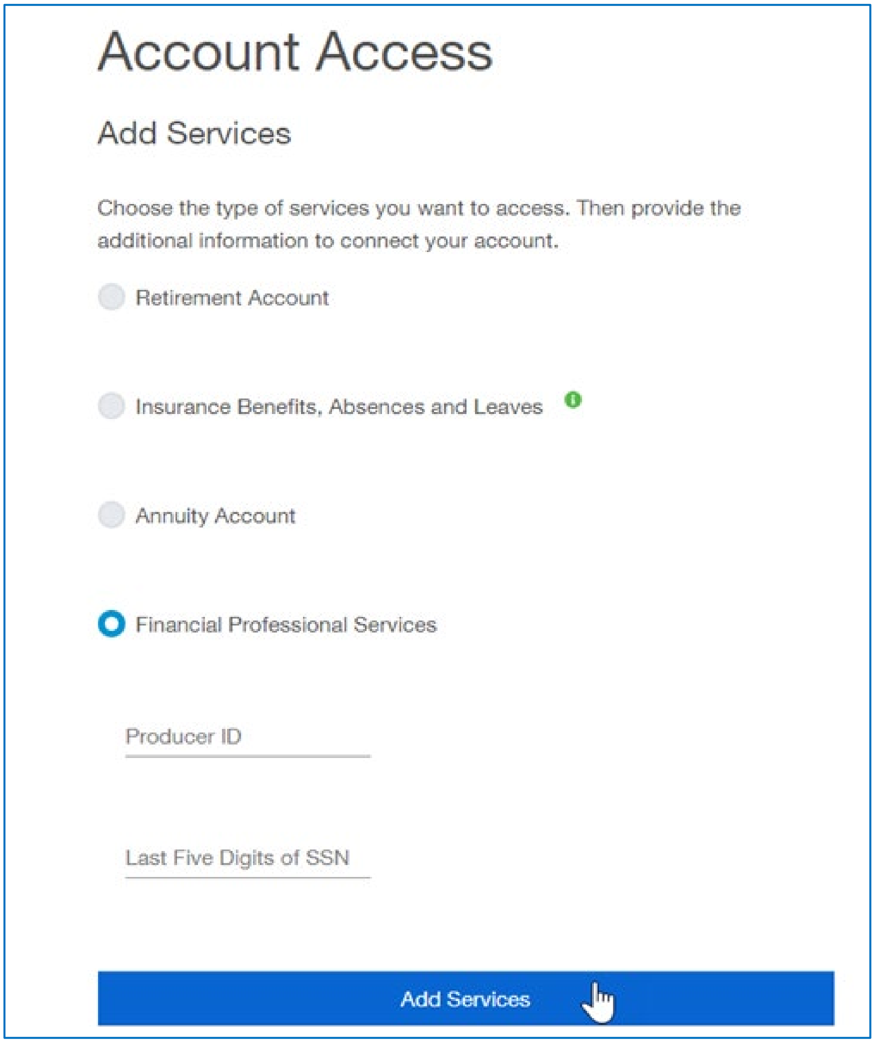
15. Next, in the Connect your account? window, select **Yes, Continue to Connect**.



16. Choose **Financial Professional Services** and enter your identifying information:
    a. Enter your 10-digit **Producer ID or Agency ID**.
    b. Enter the last five digits of the **SSN or TIN associated with the Producer or Agency**.
    c. Select **Add Services**.

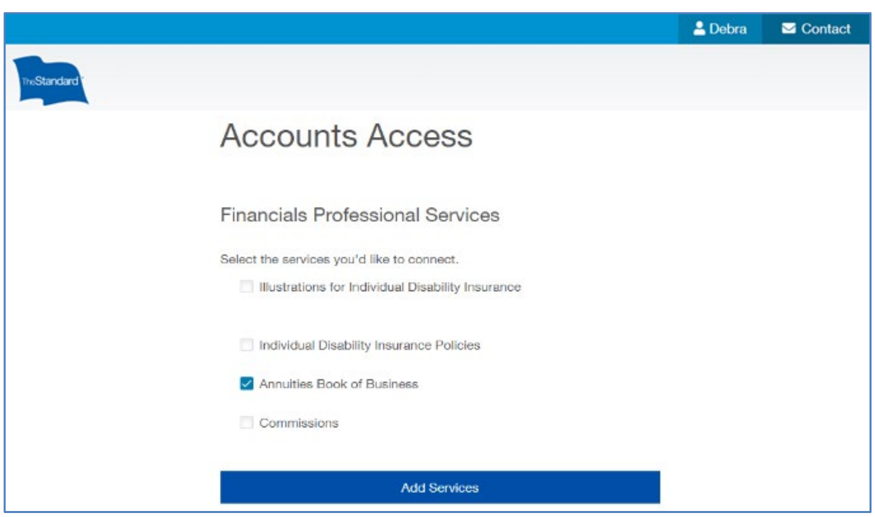
> Note: Producers and agencies are provided a 10-digit ID upon contracting with The Standard. This ID can be found in the upper-right corner of the commission statements delivered to you or your firm.

Additional fields will open. Producers and assistants use the Producer ID and SSN. Back-office staff use your Agency ID and TIN.

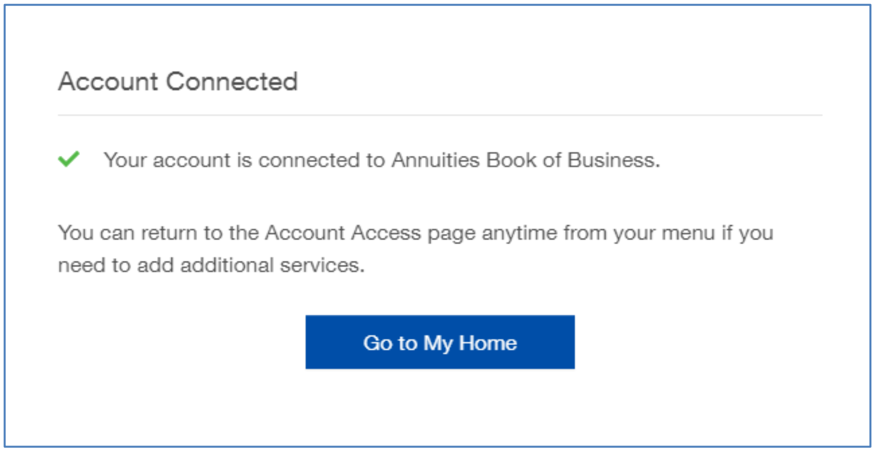


When you have successfully connected to Financial Professional Services, the Account Access window displays.

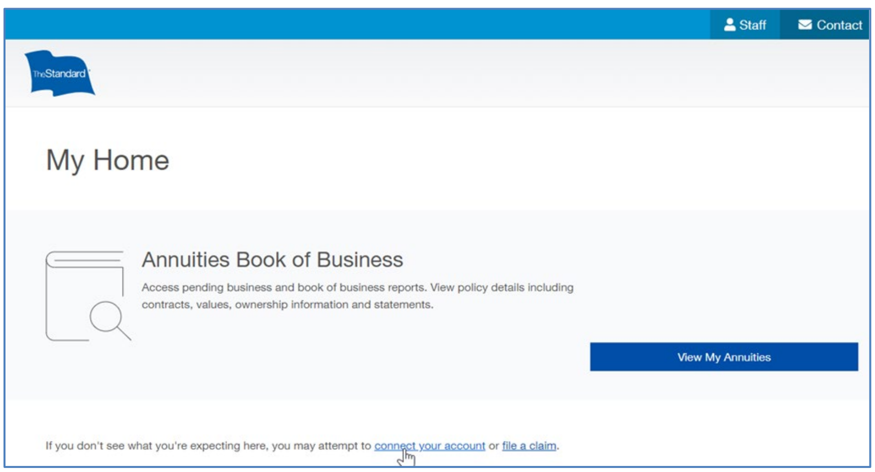
17. In the Account Access window, choose Annuities Book of Business, then select **Add Services**.



18. In the Account Connected window, select **Go to My Home**.



19. The My Home screen displays. When you are ready to view your Annuities Book of Business, select **View My Annuities**.



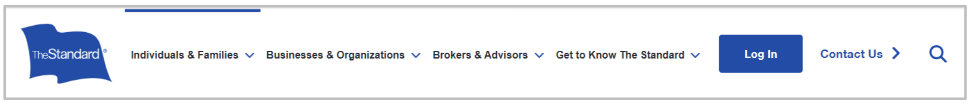
Access Services With An Existing Account

You may access The Standard's Annuity Producer Portal by adding a new service to your existing user account.

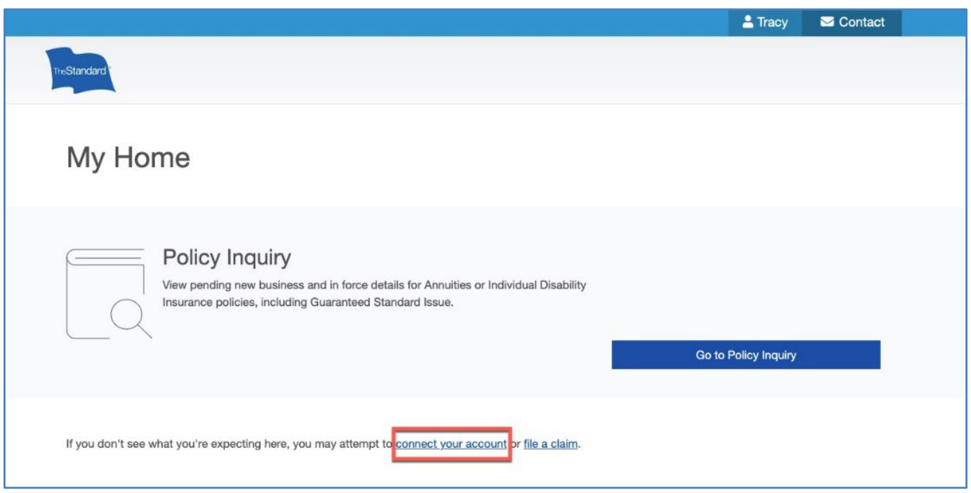
How to Log In and Connect to the Annuity Producer Portal

Complete the following steps:

1. Go to standard.com/annuities to open The Standard's annuity homepage.
2. In the upper-right corner, select **Log In**.



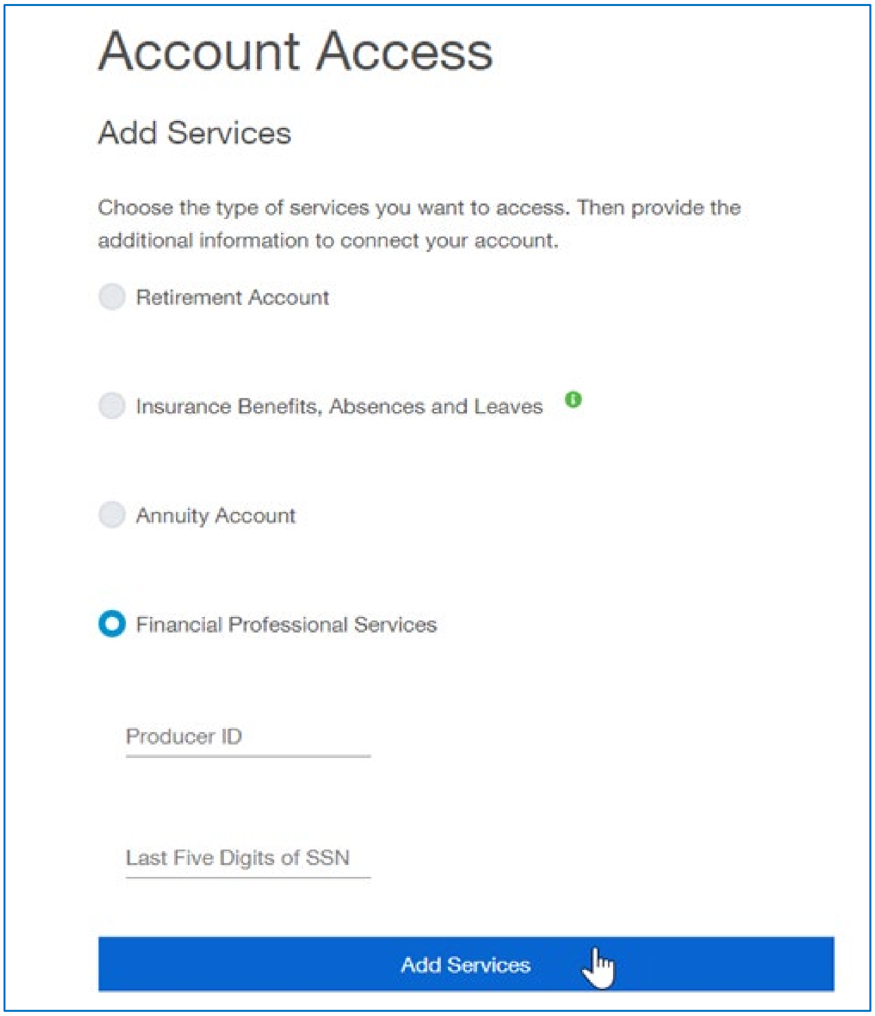
3. Use your **User Name** and **Password** credentials to log in**.**
4. If prompted, retrieve and enter your secure six-digit verification code.
5. On My Home, click the **connect your account** link.



6. Choose **Financial Professional Services** and enter your identifying information:
   a. Enter your 10-digit **Producer ID or Agency ID**.
   b. Enter the last five digits **of the SSN or TIN associated with the Producer or Agency.**
   c. Select **Add Services**.

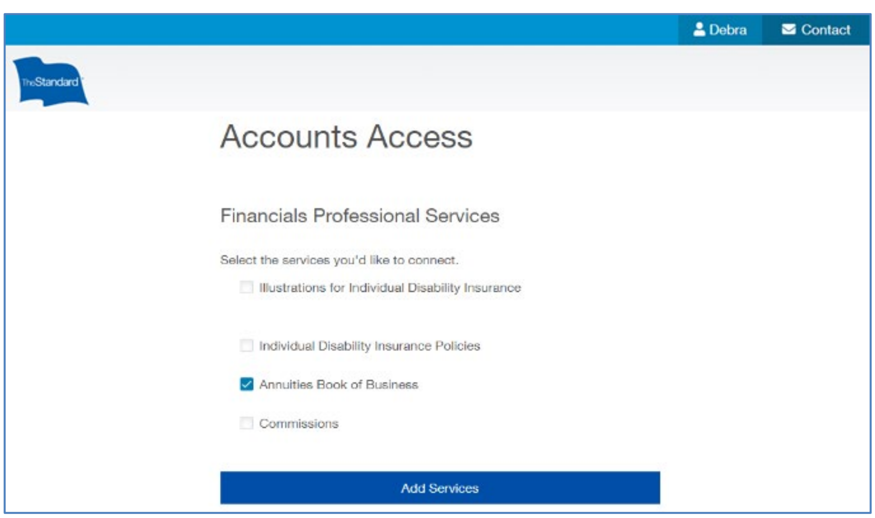
> Note: Producers and Agencies are provided a 10-digit ID upon contracting with The Standard. This ID can be found in the upper-right corner of the commission statements delivered to you or your firm.

Additional fields will open. Producers and assistants use the Producer ID and SSN. Back-office staff use your Agency ID and TIN.

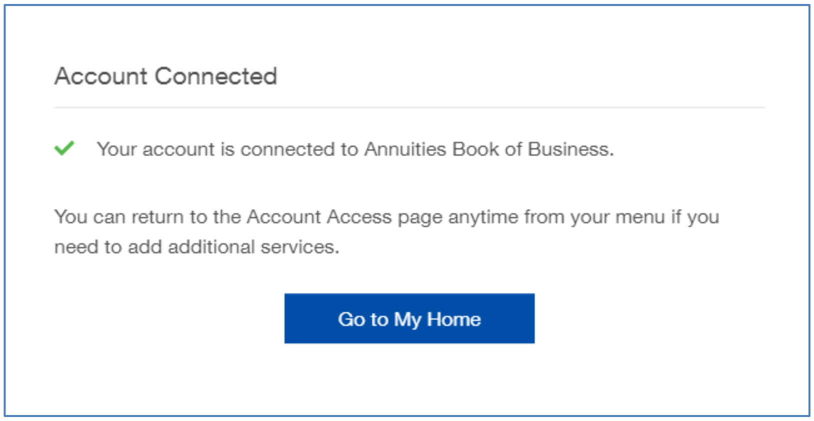


When you have successfully connected to the Financial Professional Services, the Account Access window displays.

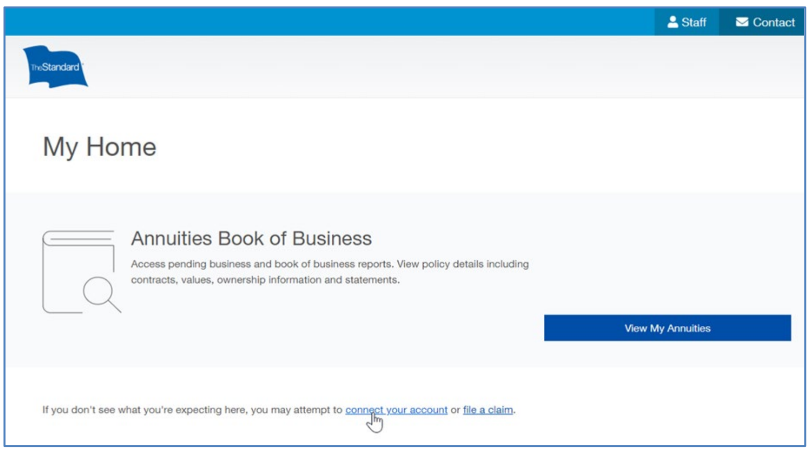
7. In the Account Access window, choose **Book of Annuity Contracts** and then select **Add Services**.



8. In the Account Connected window, select **Go to My Home**.

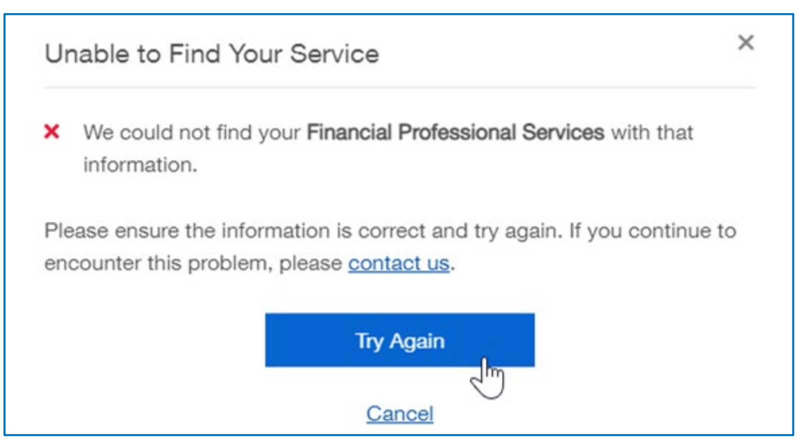


The My Home screen displays. When you are ready to view your Annuities Book of Business, select **View My Annuities**.



TROUBLESHOOTING OR ALTERNATE PATH: The Unable to Find Your Service window displays if the system is unable to match your information to your annuity contract.

Click **Try Again** to redisplay the Account Access page and re-enter your information.



Manage Your Online Account

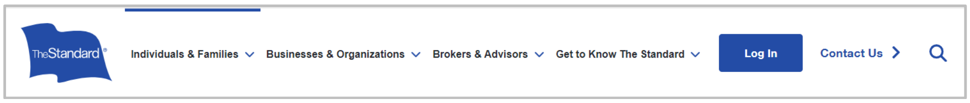
The Standard provides both self-service and guided assistance for your online account.

Forgot Your User Name or Password?

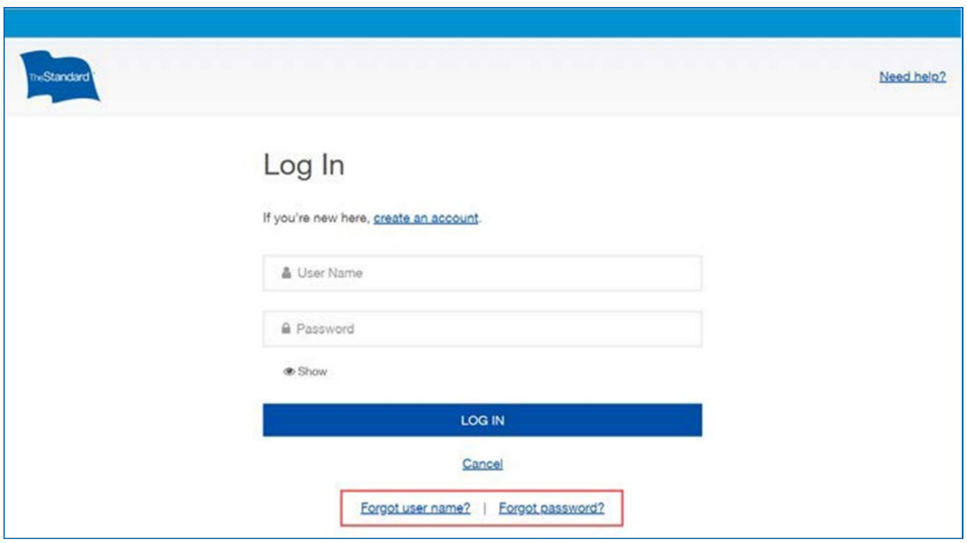
It happens. If you have forgotten your account user name or password, you can use the self-service *Forgot user name?* or *Forgot password?* feature on the Log In page.

1. Go to standard.com/annuities to open The Standard's annuity homepage.

2. In the upper-right corner, select **Log In**.



3. On the Log In page, choose **Forgot user name?** or **Forgot password?**.



Forgot user name

- Enter the verified email address on file for your account, and we'll send you an email with your user name.
- Have multiple accounts that use the same email or don't have a verified email on file? Just give us a call at 800.247.6888.

Forgot password

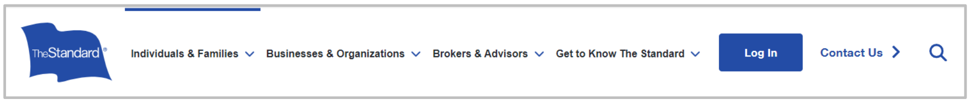
- Enter your user name and verified email address on file for your account, and we'll send an email with a link to create a new password.
- Make sure to create a new password within 60 minutes before the link expires. If the link expires, click Forgot password? to repeat the process.
- If you remember your password, simply disregard the email.

Need to Change Your Information or Verification Code Delivery Method?

You can easily update your email address, phone number or the way you receive your two-step verification code by managing your profile settings online.

1. Go to standard.com/annuities to open The Standard's annuity homepage.

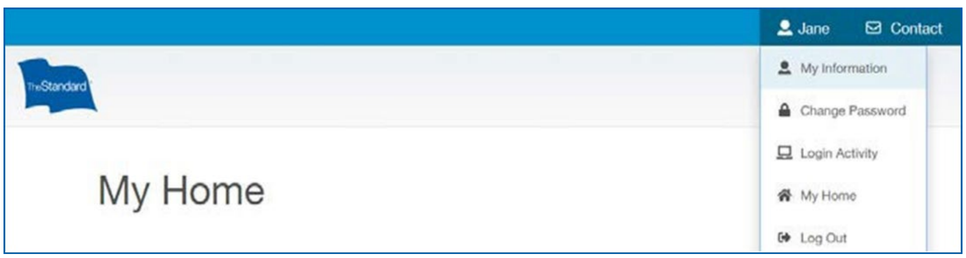
2. In the upper-right corner, select **Log In**.



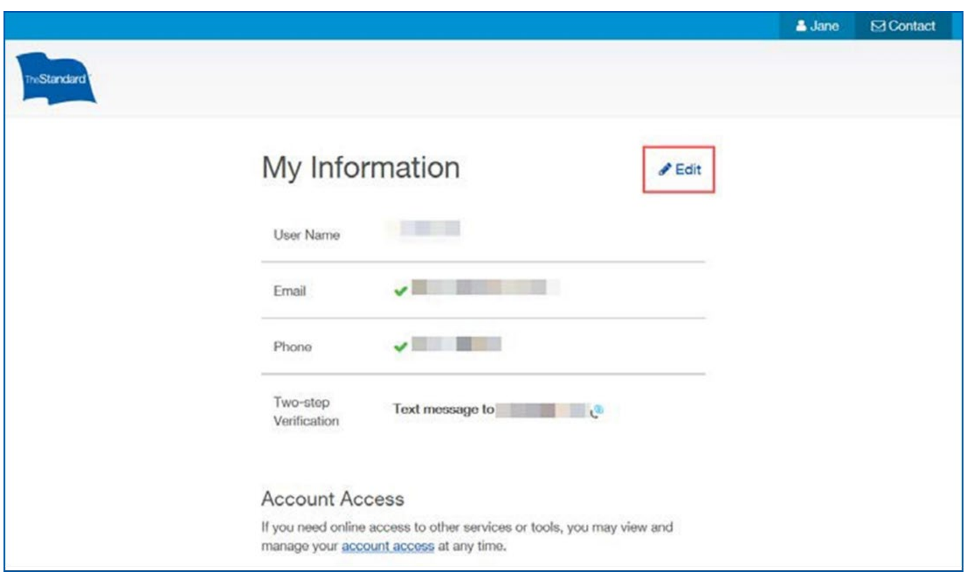
3. Use your **User Name** and **Password** credentials to log in**.**

4. If prompted, retrieve and enter your secure six-digit verification code.

5. On the My Home screen, click the user profile menu, and then select **My Information**.



6. Click **Edit** to modify your email address, phone number or the method selected to receive your two-step verification access codes.



Some changes may require you to verify your two-step verification method.

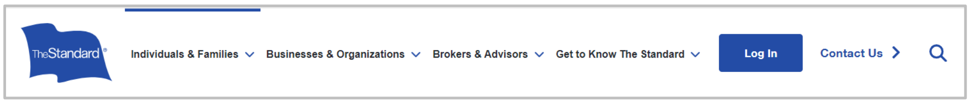
7. When changes are complete, click the user profile menu, and then choose **My Home**.

Need to Trust or Not Trust a Device?

When you frequently use a device to log in to your account, you can designate it as *trusted* during the login process. Using a trusted device allows you to log in without having to enter a verification code. You can manage the devices used to access your account on the Login Activity page. You can mark a trusted device as untrusted, when it is lost or no longer in use.

1. Go to standard.com/annuities to open The Standard's annuity homepage.

2. In the upper-right corner, select **Log In**.



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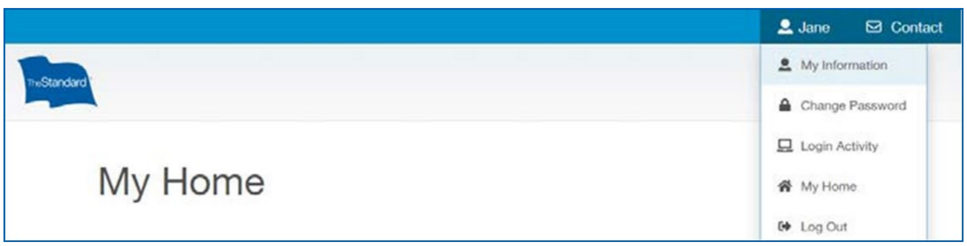
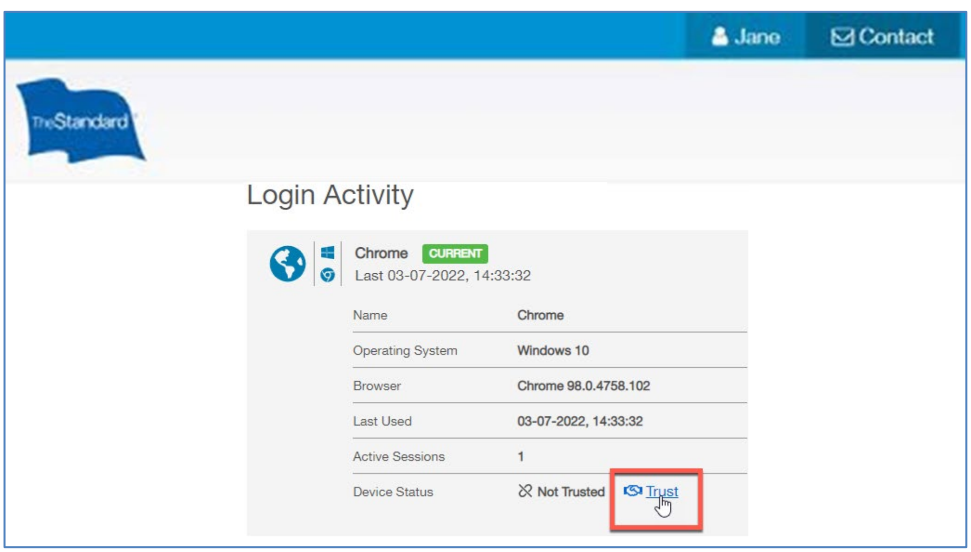


6. Locate the device and select **Untrust**.



When changes are complete, click the user profile menu, and then choose **My Home**.