



# Athene Annuity New Business Tip Sheet

*Annuities Issued by Athene Annuity  
& Life Assurance Company*

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Servicing your annuity business is our highest priority. However, we can't do it alone. It takes teamwork before, during and after the sale to assure that your new business submissions are processed promptly and accurately.

## Before the sale

Product training is required for agents in states that have adopted the NAIC Suitability in Annuity Transaction Model Regulation prior to submitting an application. Our training modules can be found at [www.atheneannuity.com/producer/doingbusiness](http://www.atheneannuity.com/producer/doingbusiness).

## During the sale

Review the list below as you prepare your business for submission to assure prompt processing:

### Application

- Physical street address is completed in full - **no PO boxes**
- If owned by a **non-natural owner**, the annuitant information must be filled out completely
- **Beneficiary allocation percentages** are indicated in whole numbers and names are included (*we will not accept "all children of insured" or "per stirpes"*)
- **Replacement information** completed in full if there is existing coverage or replacing a contract
- Application is **dated and signed** and **city and state** have been indicated
- Does the application include a check? Generally, **third party checks** cannot be accepted. Please review the AML Appendix in our Doing Business guide prior to submitting a premium deposit.

### Company Suitability Form (form number: N1000 or state-specific version)

- When replacing an existing contract, a current **statement of values** must be provided
- All information has been completed in full, including **financial profile questions**
- **Product name and surrender period** completed
- **Source of funds** is clearly identified

## After the sale

Our customer service representatives are ready to help and can be reached at 855-428-4363.

## How to contact the Athene Annuity Processing Center

Phone – 866-690-1992  
Fax – 770-690-1985

### Regular Mail

Athene Annuity & Life Assurance Company  
PO Box 725449  
Atlanta, GA 31139

### Overnight Mail

Athene Annuity & Life Assurance Company  
6425 Powers Ferry Road, Suite 300  
Atlanta, GA 30339