



Athene Annuity NY New Business Tip Sheet

Annuities Issued by
Athene Annuity & Life Assurance Company of New York

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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 ensure that your new business submissions are processed promptly and accurately.

Before the sale

Product Specific Training (PST) is required for agents in New York state prior to submitting an application. To take the PST training for ATHENE MaxRate®, please visit www.AtheneAnnuityNY.com/producer

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. Please see below for Regulation 60 replacement requests
- 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 NY)

- 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

Submitting Business

Fax (with coversheet): 770-690-1985

Email: NYAtheneNB@Athene.com

Please note:

- Some Ceding Carriers may still require original signatures for transfers including rollover assets.
- If the application includes funds, please do not include a copy of the check.

Regular Mail:

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

Express/Overnight Delivery:

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

Questions? Contact the Annuity Processing Center at: 866-690-1992

After the sale

Our customer service representatives are ready to help and can be reached at 855-4-ATHENE.

Website: www.AtheneAnnuityNY.com/producer

Sales Desk: 855-4-ATHENE

Annuities issued by Athene Annuity & Life Assurance Company of New York, Nyack, NY.

