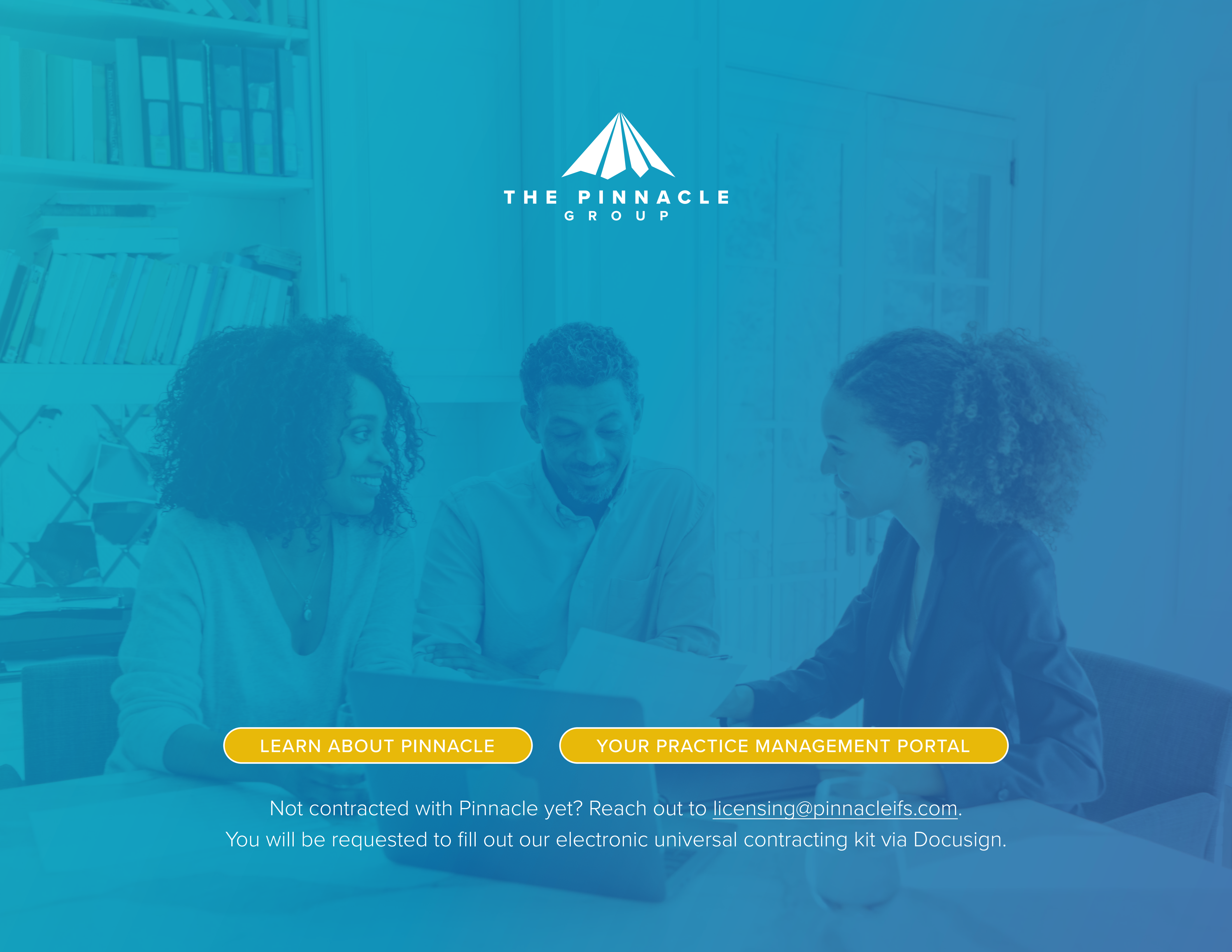

THE PINNACLE GROUP

LEARN ABOUT PINNACLE

YOUR PRACTICE MANAGEMENT PORTAL

Not contracted with Pinnacle yet? Reach out to licensing@pinnacleifs.com.
You will be requested to fill out our electronic universal contracting kit via Docusign.

ANNUITY SUBMISSION PROCEDURE

First, register on the advisor portal here

Begin contracting and appointments

Request for Contracting/Appointment
OR email Licensing@PinnacleIFS.com for annuity licensing/contracting requests
OR email Annuities@pinnacleifs.com

For illustrations or to discuss a case

800-356-1167, follow prompts for annuity division
OR contact Matt Millien at 904-309-9526, Matt.Millien@PinnacleIFS.com

For Annuity Rates, appraisals, and product training

Click here to access the Annuities tab via your portal
OR go to your advisor portal, select “Annuities” then “Annuity Rates & Applications”

ANNUITY SUBMISSION PROCEDURE CONTINUED

Submission Process

1. Pinnacle provides case illustration & recommendations
2. Advisor meets with client
3. Pinnacle verifies product training requirements with carrier
4. Pinnacle packages application kit and checks to verify if advisor is properly licensed/appointed
5. Electronic application submission (or paper application to Pinnacle)
6. Pinnacle reviews application for accuracy and completion and reviews licensing validation
7. Pinnacle submits to carrier
8. Carrier performs suitability review, processes application, and issues policy
9. Pinnacle sends weekly updates to advisor through completion/ issue/delivery from Chrystal.Heath@PinnacleIFS.com

ANNUITY OVERVIEW

The Annuity Division Provides

- Assistance with carrier appointments
- Carrier product training verification
- Case consultations
- Product marketing materials
- Carrier product applications
- Case follow-up (contact via phone or email per advisor's preference) from Chrystal.Heath@PinnacleIFS.com
- Appraisal of an existing annuity

INSURANCE CONTRACTING PROCEDURE

Life (Term & Permanent), LTC, & Disability

Contracting and licensing: If you are not yet contracted with Pinnacle or appointed with the carrier, reach out to licensing.

Go to your advisor portal and select "Contracting" or click here
OR contact licensing at licensing@pinnacleifs.com if you have questions

Separate appointments needed for each carrier

Management of your case:

- Once your case application is submitted, you will be assigned to a case manager who will work closely with you on the case until its submission
- You will be provided weekly communications on the status of your client's application and its final submission – unless there is a change. These updates are automatically provided via email, unless you specify that phone is preferred.

LIFE INSURANCE SUBMISSION PROCEDURE

Term Insurance Submission

Not sure what type of insurance you need?
Reach out to casedesign@pinnacleifs.com for help.

FOR TERM QUOTES AND APPLICATION:

Get started by clicking here
Please note, you will also see the option for permanent insurance, which is not for quotes, but for when you already have an illustration.

Click to watch a video tutorial

LIFE INSURANCE SUBMISSION PROCEDURE

Permanent Insurance Submission

FOR PERMANENT INSURANCE:

1. **Obtain an illustration:** email casedesign@pinnacleifs.com
   OR call 800-356-1167, option 4

2. **Put it in motion:**

Electronic:

Click to watch a video tutorial

- Go to your Pinnacle portal
- Select “Life Insurance” or click here
- In the “iGo Dashboard” section, click the “Start or Edit a Case” button

Paper:

- Go to your Pinnacle portal
- Select “Life Insurance” or click here
- In the “iGo dashboard” section, click the “Forms and Apps” button
- Fill out the form and submit to applications@pinnacleifs.com

LONG-TERM CARE

To request a long term care quote and start an application

Go to your advisor portal, select “Long Term Care” or click here

Contact Virginia Barausky at 813-310-6834 or Virginia.Barausky@PinnacleIFS.com

To start an application

Go to your advisor portal, select “Long Term Care” and scroll down to the “Long Term Care Application” section

Click to watch a video tutorial

DISABILITY

To request a disability quote

Go to your advisor portal, select "Disability" and click the Request Disability Quote button

To discuss a disability insurance case

Contact Brent Lamon at 904-309-9782 or Brent.Lamon@PinnacleIFS.com