



# Annuity Resource Hub



# Everything at your fingertips

Welcome to our Annuity Resource Hub! Here’s a quick guide to navigate our website where you can access many of our resources 24/7 without having to login.

Learn more about what’s available to you.

## Contents

Homepage Options .....	<a href="#">4</a>
Key Actions	
Annuity Resources	
Annuity Portal	
Plan Type Availability	
Illustrations	
Fixed Index Annuities Resource Toolkit	
Marketing Resources	
Distributor Drop Down Options .....	<a href="#">8</a>
Rates or Rate Cards	
Product Information	
Forms and Applications	
Contact Us .....	<a href="#">10</a>
Sales Support	
Annuity Services	
New Business	
Marketing	



# Homepage Options

Discover our featured resources on [standard.com/annuities](https://standard.com/annuities).

## Key Actions

Use the key actions on our main page to gain quick access to our Annuity Portal, illustration software and marketing toolkits.

## Annuity Portal

Our annuity portal is an empowering way for financial professionals to access important annuity information online. You'll see what your clients see when they log in, and more!

### Accessing the Annuity Portal

Learn how to create a profile for quick access to your annuity information online.

- If you don't have an account, easily create one by following our [new user account instructions](#).
- If you do have an account, start at [standard.com/annuities](https://standard.com/annuities).
- Select the blue "Log In" button located at the top right of the screen.
  - If you're on mobile, select the menu icon in the top left corner of the screen and navigate to the "Log In" option.
- Enter your username and password.

### Features

- **View Book of Business:** Access pending and issued policies.
- **Policy details:** Check rates, account value, scheduled payouts, beneficiaries and more.
- **Updates on pending policies:** Stay informed about the status of pending policies.
- **Documents:** Easily view and download statements, contracts and tax documents.



## Plan Type Availability

Stay updated on our plan type availability.

- Start at [standard.com/annuities](https://standard.com/annuities).
- Select "Plan Type Availability" in the Resources section on the right side of the homepage.
- Review the options available.

**Illustrations** 

Create your own annuity product illustration to present to your clients.

- Start at [standard.com/annuities](https://standard.com/annuities).
- Navigate to the **Key Actions** section and select “Run an Illustration.”
- When prompted, select “Continue to ImagiSOFT” in the popup box.
- Select the type of product you want to illustrate.
- Provide your agent information and select your **Distributor**, then select “Next.”
- Enter your client information and select “Next.”
- On the product selection page, choose the desired product in the drop-down menu and select “Next.”
- Input the policy information required and select “Next.”
- Review the Summary of Values and select “Next.”
- After completing these steps, access your illustration. Checkmark “Strategy Detail” if needed.
- Select “Preview” to view the illustration as a PDF, export if desired.

**Fixed Index Annuities Resource Toolkit** 

Dive into FIAs to discover client benefits and access exclusive sales materials. Learn about the features and advantages to better position them to your clients.

- Start at [standard.com/annuities](https://standard.com/annuities).
- Navigate to the **Key Actions** section and select “Fixed Index Annuities Resource Toolkit.”



**Marketing Resources** 

Use our sales idea flyers and marketing materials to help guide your client conversations.

- Start at [standard.com/annuities](https://standard.com/annuities).
- Select “Get Marketing Toolkits” in the **Key Actions** section.
- Select a toolkit topic that fits your needs.
- Discover sales idea flyers. Feel free to download or print for future use.





# Distributor Drop Down Options

Dive deeper into our resources through our distributor microsites. **Don't worry, no username or password needed!**

## Rates or Rate Cards

Locate your product page to view rates or print rate cards.

- Start at [standard.com/annuities](https://standard.com/annuities).
- Select your **Distributor** in the left-side drop-down menu or select “not affiliated with a distributor or distributor not listed.”
- Your customized product page displays your product portfolio and annuity rates.
- Download or print your own rate card by choosing the “Print Rate Card” button.

## Product Information

Access product overviews, features, index descriptions and sales resources.

- Start at [standard.com/annuities](https://standard.com/annuities).
- Select your **Distributor** in the left-side drop-down menu or select “not affiliated with a distributor or distributor not listed.”
- Scroll down to the product rates and select the desired product title.

### In the product details section, you can find:

- Overview
  - Learn the product details.
- Features
  - Get a list of the key features.
- Sales resources
  - Download product marketing materials including brochures and fact sheet.
  - Access numerical examples — an interactive calculator.

## Forms and Applications

We've made it easy to access forms and applications on our website whenever you need them. There's no need to call our sales support line or sign in to your account. Here's how:

- Start at [standard.com/annuities](https://standard.com/annuities).
- Select your **Distributor** in the left-side drop-down menu or select “Not affiliated with a distributor or distributor not listed.”
- Navigate to the **Key Actions** section and select “Find Forms & Materials.”
- Enter service type, state, product type and product name. Continue by selecting “Get PDF Forms Package.”
- Add the needed forms. Select “email” or “print” as you need.



### Find forms like:

- |                         |                          |
|-------------------------|--------------------------|
| • Applications          | • Certification of Trust |
| • Distribution form     | • Suitability Guidelines |
| • Change form           | • IRS RMD form           |
| • Ownership change form | • Brochures              |



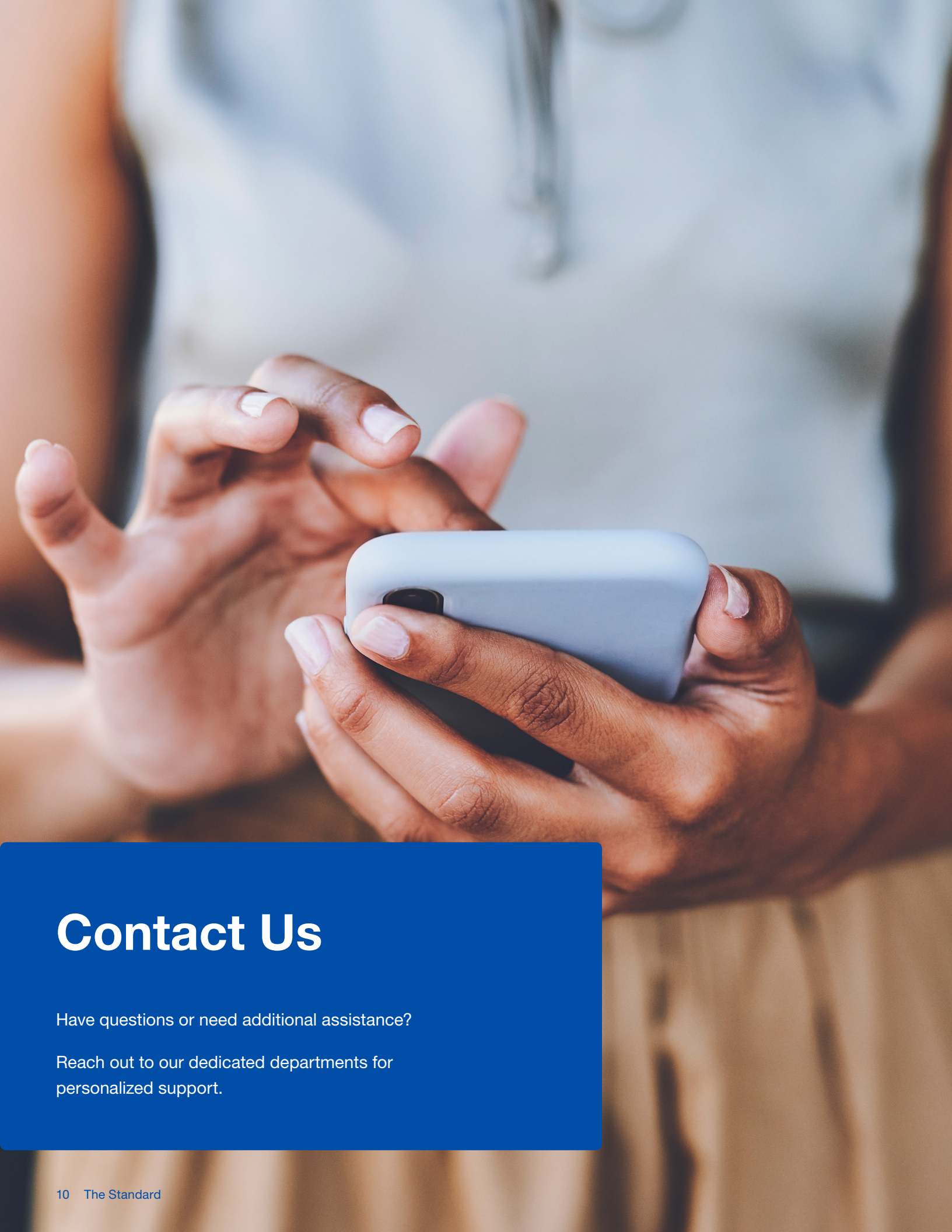
## Submit Paper Applications

Access paper application packets from our website. Easily submit your applications for processing by:

**Email:** [annuitynewbiz@standard.com](mailto:annuitynewbiz@standard.com)

**Local Fax:** 971.321.5742

**International Fax:** 800.378.4570



# Contact Us

Have questions or need additional assistance?  
Reach out to our dedicated departments for personalized support.



## Sales Support:

Contact us for assistance or personalized support.  
[annsales@standard.com](mailto:annsales@standard.com) | 800.378.4578

## Annuity Services:

Reach out for policy updates or questions.  
[annuityservices@standard.com](mailto:annuityservices@standard.com) | 800.247.6888

## New Business:

Get in touch if you have submission questions.  
[annuitynewbiz@standard.com](mailto:annuitynewbiz@standard.com) | 800.247.6888

## Marketing:

Get help finding marketing resources.  
[annuitymarketing@standard.com](mailto:annuitymarketing@standard.com)



Standard Insurance Company | 1100 SW Sixth Avenue, Portland, OR 97204 | [standard.com](https://www.standard.com)

The Standard is a marketing name for StanCorp Financial Group, Inc. and subsidiaries. Insurance products are offered by Standard Insurance Company of Portland, Oregon, in all states except New York. Product features and availability vary by state and are solely the responsibility of Standard Insurance Company.