



ACCESSING ADVISORY ANNUITIES AT PACIFIC LIFE

✉: AdvisorySolutions@PacificLife.com

🌐: PacificLifeASD.com

Pacific Life's Advisory Solutions Desk makes it refreshingly simple for RIAs to access advisory annuities. Follow these step-by-step instructions to aid Pacific Life in the evaluation of your client's financials and determination if a Pacific Life advisory annuity is right for your client.

Getting Started

Gather Client Information

First, collect all client information needed to complete the Client Proposal Form and begin the process of evaluation. Items could include:

- Financial Profile
- Personal Information
- Current Annuity or Life Insurance Statements (if considering a replacement or transfer)

[Click here](#) for information to share with your client about our privacy protection policies.

Register Online

To access the Client Proposal Form, create an account and register online at PacificLifeAdvisory.com.

- Select "Investment Advisor Representative (IAR)" as your role and complete the remaining fields.
- Be sure to indicate that you do not have active contracts and wish to work directly with Pacific Life.

Requesting a Client Review

Step 1: Complete Client Proposal Form

- Log in to PacificLifeAdvisory.com to access the Client Proposal Form and complete all the required fields.
- Complete the [Advisory Onboarding Agreement](#), which is used to set up electronic funds transfer (EFT) instructions, data feeds, and provide full web access to the client's annuity accounts. This form is required only once prior to submitting business for all new RIA firms and TPIA firms.

If you need help, contact our team at (800) 722-7574 or email AdvisorySolutions@PacificLife.com.

Step 2: Advisory Solutions Case Review

A Pacific Life licensed advisory specialist will contact you to discuss the details of your client's case.

What to expect:

- **Confirmation**—A licensed advisory specialist will call you to confirm receipt of the case and gather any additional or missing details needed to determine if an annuity is right for your client.
- **Review Process**—After all information has been received, annuity specialists will do a thorough review of the case and determine if an annuity is suitable for your client.

Step 3: Finalize Annuity Application

If your client's annuity case is approved, a licensed advisory specialist may need to speak with you and the client directly to complete the application process and request signatures from your client. A few additional forms you'll need to sign:

- **Advisory Authorization Form**—Signed by you and the client to provide authority on the contract (trading/allocation changes and fee withdrawals).
- **Advisory Fee Withdrawal Request**—Dictates how the advisory fee is withdrawn regarding percentage/amount and frequency. Signed by the IAR or TPIA.

Once Contract is Issued

Managing the Client's Annuity Accounts

Log in to PacificLifeAdvisory.com and click "Contract Management" to see your client's annuities. Note: Contract Management provides contract information for active, annuitized, and inactive contracts (up to 24 months).

You also can view variable annuity performance and fixed rates under "Business Tools."

Discover more reasons why advisory support from Pacific Life Advisory is refreshingly different.

Managing Directors	<p>You can contact your dedicated managing director with product inquiries, case design, and general sales support.</p> <p>☎: (866) 441-2354 ✉: PacificLifeAdvisory@PacificLife.com 🌐: PacificLifeAdvisory.com</p>
Advisory Solutions Desk	<p>You can contact the Advisory Solutions Desk to assist in the facilitation and evaluation of new annuity business for your clients.</p> <p>☎: (800) 722-7574 ✉: AdvisorySolutions@PacificLife.com 🌐: PacificLifeASD.com</p>
Award-Winning Customer Service ¹	<p>You and your clients can access account information via our automated line or speak directly with an annuity specialist.</p> <p>☎ Advisors: (833) 953-1863 ☎ Clients: (800) 722-4448 🌐 Clients: PacificLife.com</p>

¹ Recipient of multiple DALBAR Service Awards since 1997. Refer to www.DALBAR.com for more information regarding awards, certifications, and rankings.

Pacific Life refers to Pacific Life Insurance Company (Newport Beach, CA) and its affiliates, including Pacific Life & Annuity Company. Pacific Life Insurance Company is the issuer in all states except New York. Pacific Life & Annuity Company is the issuer in New York.

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