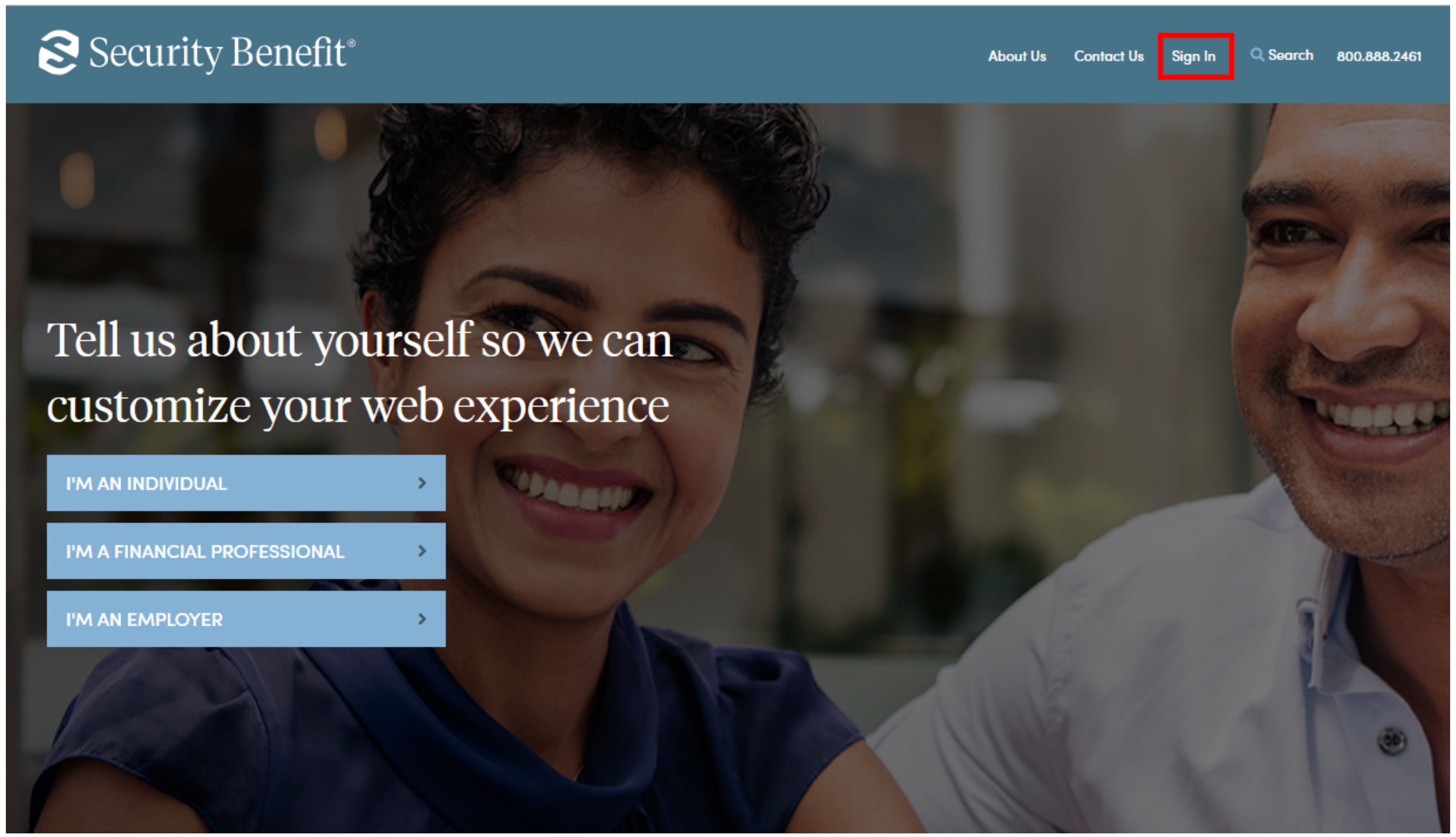
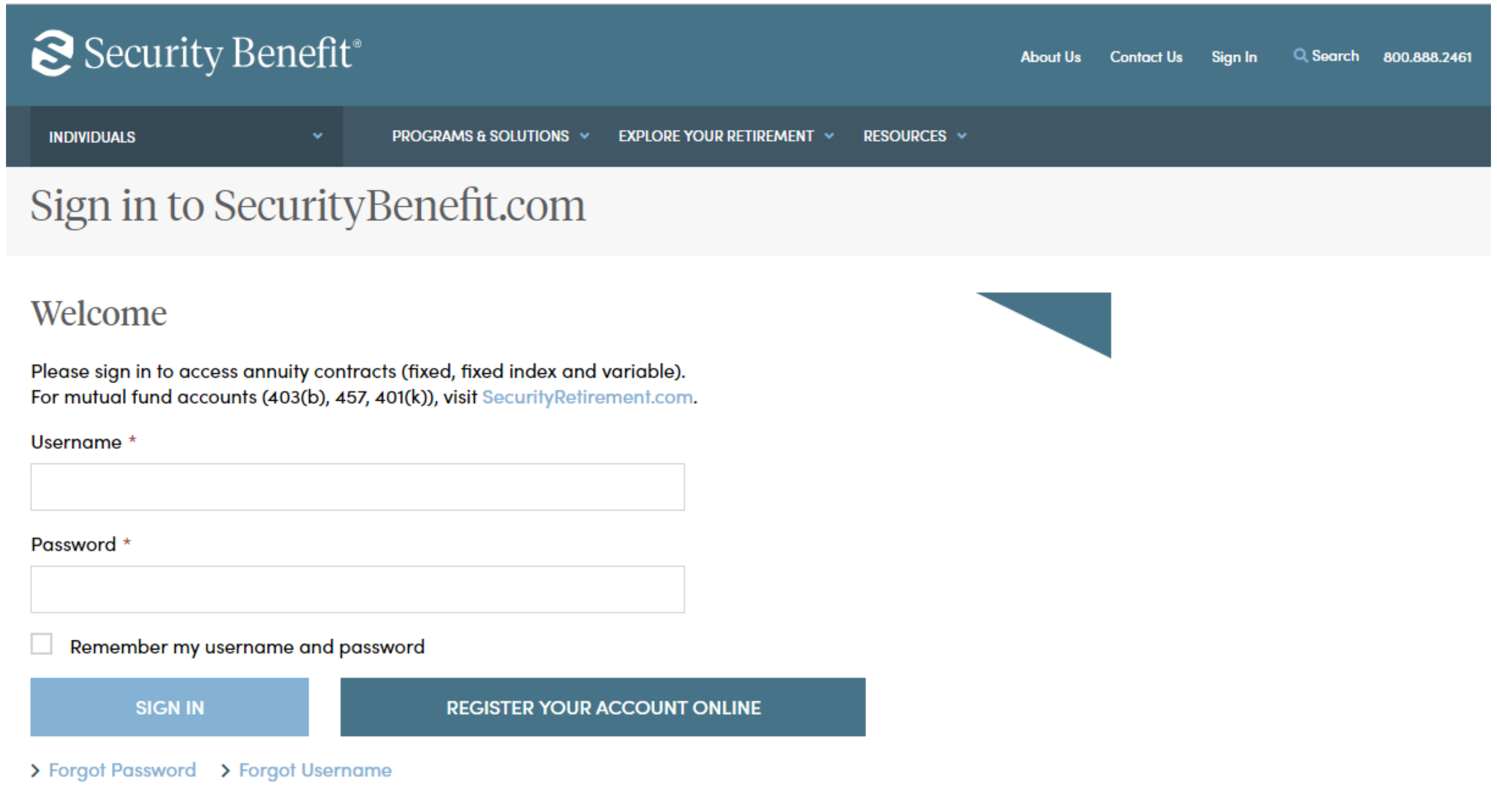
Where can I find client account values?

Financial Professionals

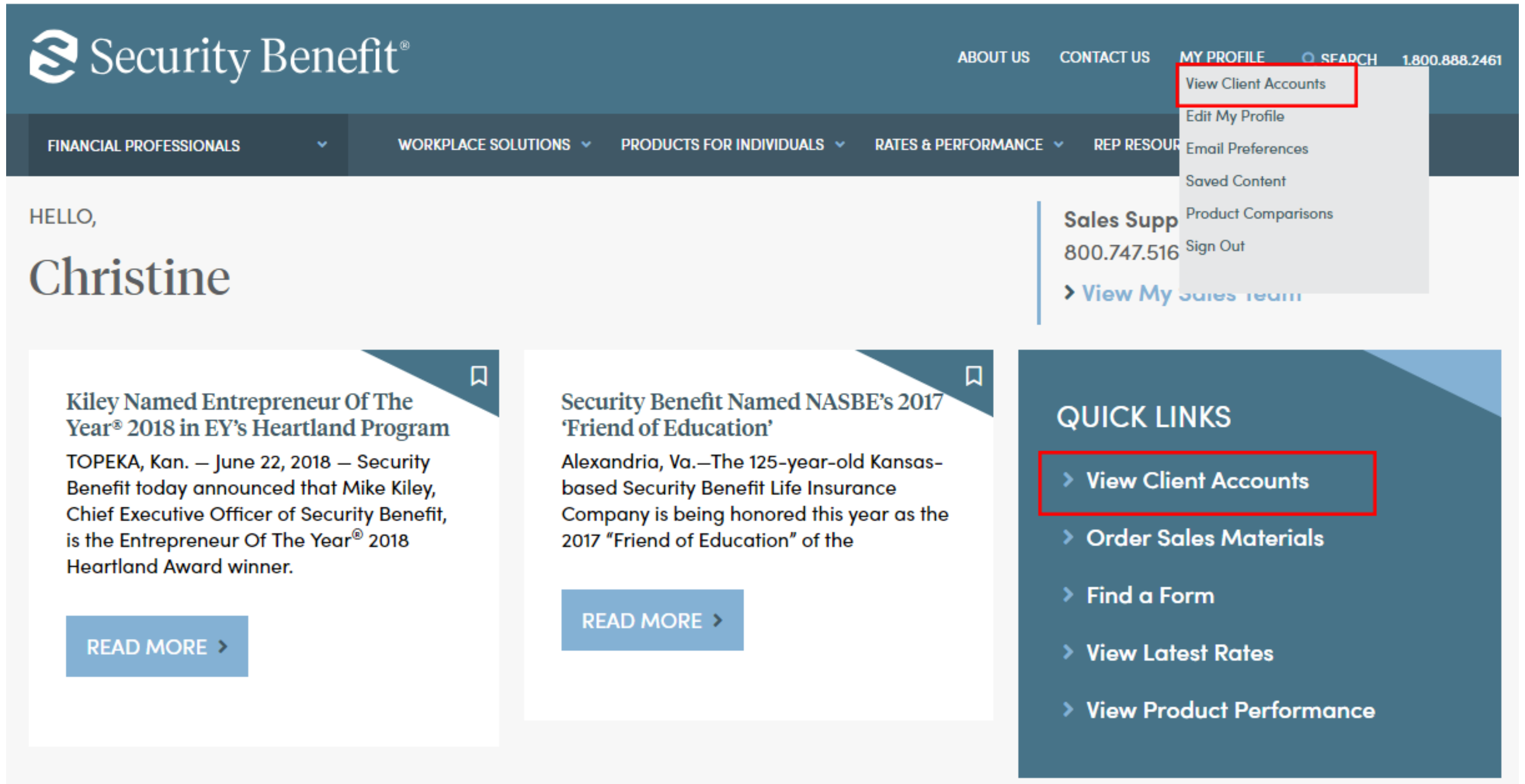
To access client account values, click on Sign In from the top navigation.



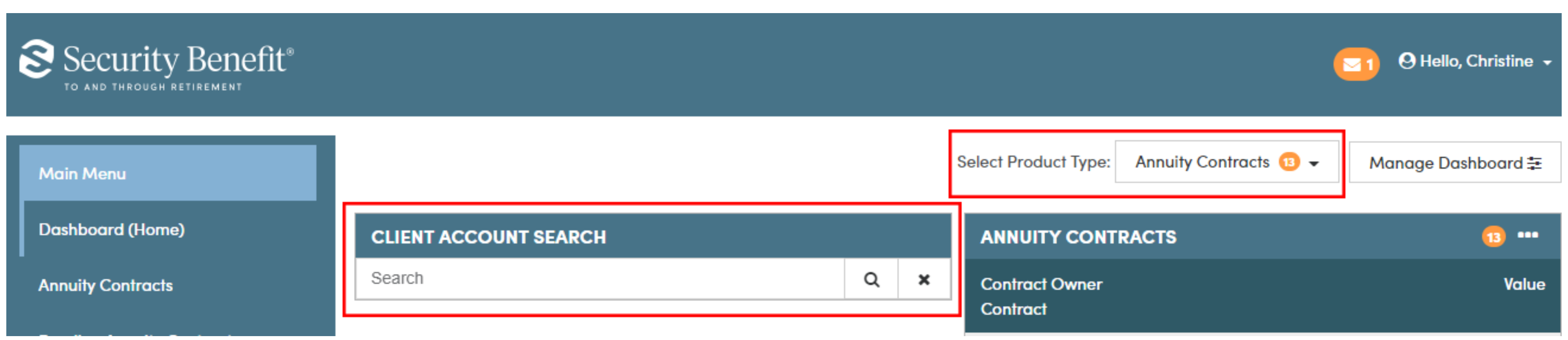
Complete the sign in process by entering your registered Username and Password.



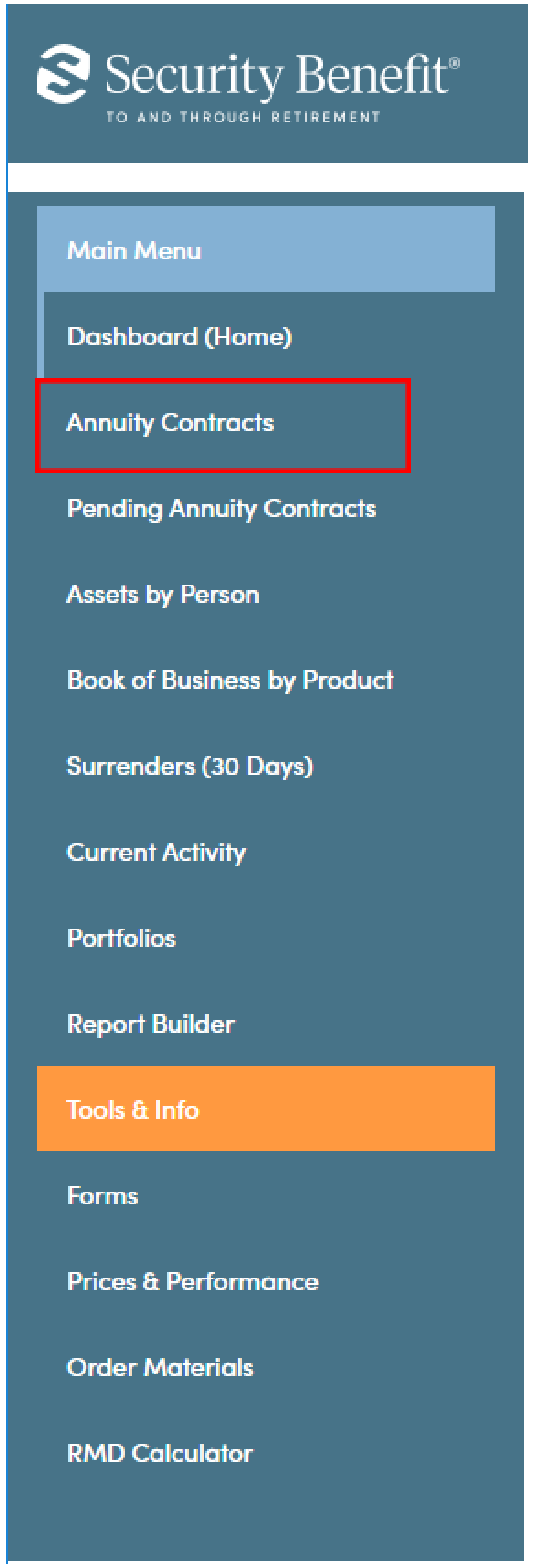
Upon successful sign in, Client Accounts are available by clicking on Client Accounts located in the top navigation or within Quick Links.



A dashboard representing the business will display. If multiple product types exist, the Products can be filtered by selecting Product Type. Client Accounts can be searched upon by Client Name or Account Number.



Client Accounts are also viewable by accessing the applicable links of the left navigation. All active accounts are viewable by selecting Annuity Contracts or Mutual Fund Custodial Accounts as determined by Product Type.



Once the Client's account is located, clicking on the Contract Owner name line will display account specific details including month end account values, Transaction history, Future

Allocations and Programs, Current Allocations, People Information, Documents and Online transactions if available.

ANNUITY CONTRACTS

Add to Portfolio	Contract	Contract Owner	Product	Qualification Type	Value
☐	7400000419	PERSON, TEST 1	SB ClearLine Annuity	Non-Qualified	$99,980.00
☐	7400000572	TEST	SB ClearLine Annuity	Roth IRA	$0.00
☐	7400000702	BENES, TEST	SB ClearLine Annuity	IRA	$0.00