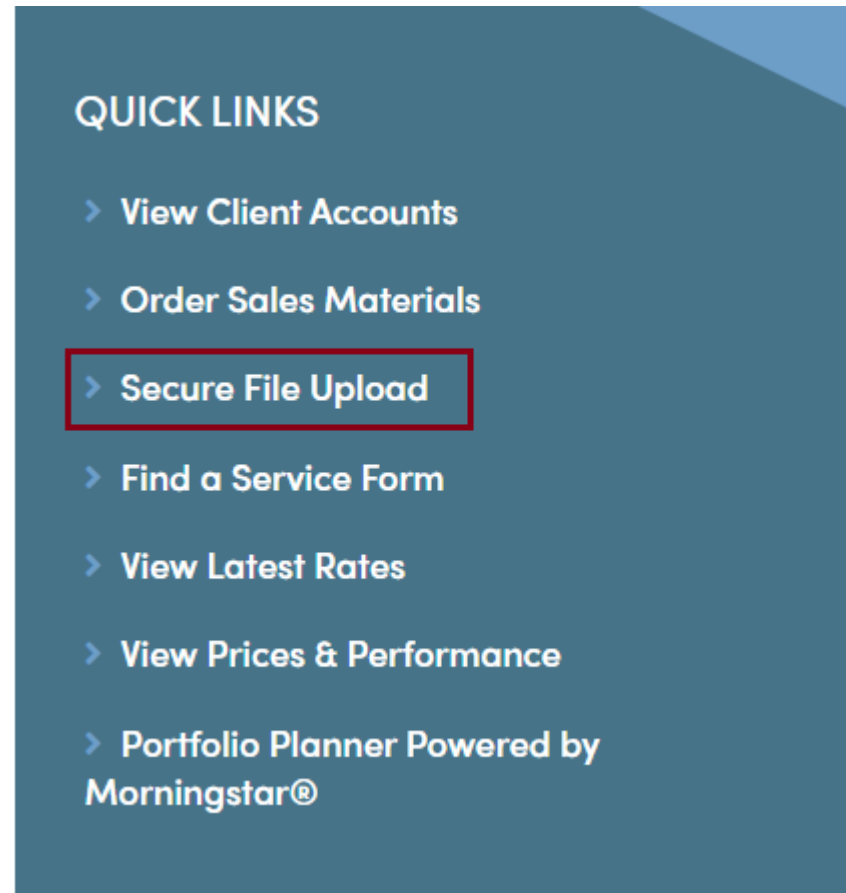


Secure File Upload Now Available

Easily Upload Documents

There are several ways to access this new feature. Once logged in, **Secure File Upload** is available via:

- **Quick Links**



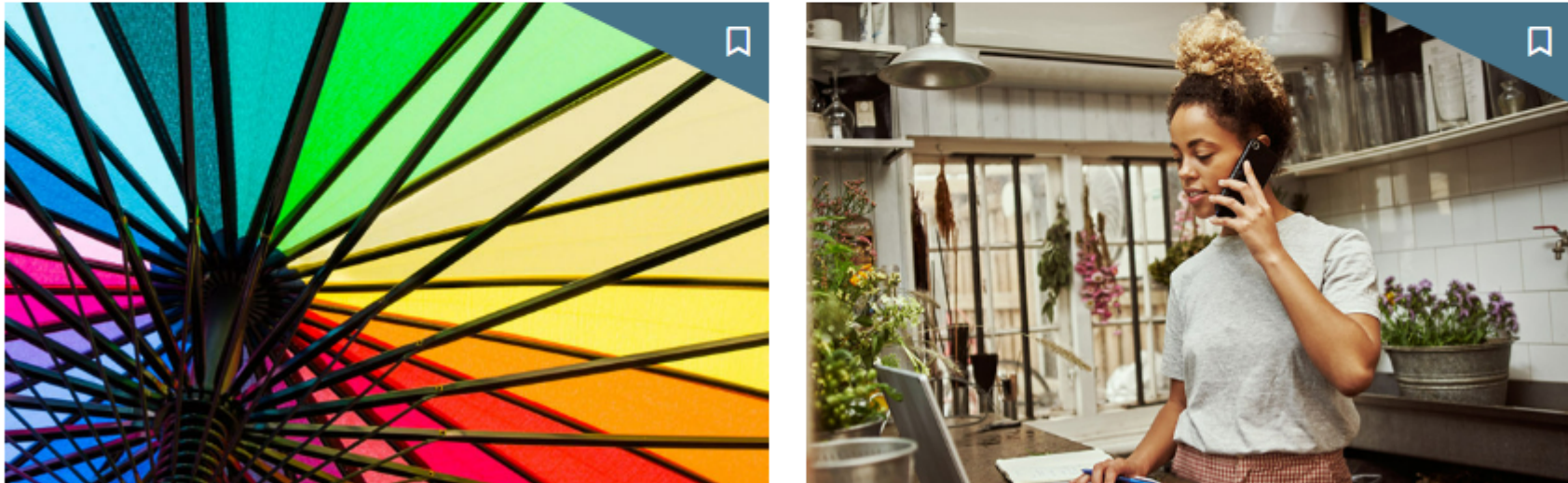
- Under **Rep Resources** in the website's main navigation

FINANCIAL PROFESSIONALS WORKPLACE SOLUTIONS PRODUCTS FOR INDIVIDUALS RATES & PERFORMANCE REP RESOURCES Help

HELLO

- > Client Accounts
- > Sales Support
- > Forms & Materials
- > Advisory Platform (formerly GTP)
- > **Secure File Upload**
- > Retirement Consolidation Center
- > Portfolio Planner Powered by Morningstar®
- > My Security Benefit App
- > Tax Center
- > FAQs

> Find a Service Form



- Within **Client Accounts**, it can be found on the left-side menu

Main Menu

- Dashboard (Home)
- Annuity Contracts
- Pending Annuity Contracts
- Book of Business by Product
- Surrenders (30 Days)
- Current Activity
- Documents
- Portfolios
- Report Builder
- Messages
- Tools & Info**
- Secure File Upload**
- Forms
- Prices & Performance
- Order Materials
- RMD Calculator

Select Product Type: Annuity Contracts 35 Manage Dashboard

CLIENT ACCOUNT SEARCH

Search

ANNUITY CONTRACTS 35

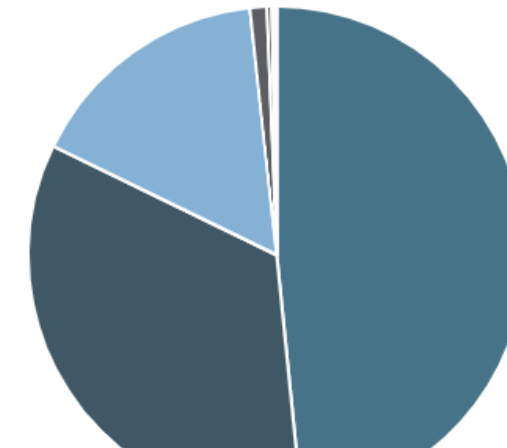
Search

Contract Owner Contract	Value
PARROTT, SAUNDRA K 2030006840	\$83,539.69
EVERETT, TREVA L 2030006909	\$11,439.57
STONE, HOWARD A 2030016264	\$49,954.51
WOLFE, SUSAN C 2030017847	\$1,882,914.00
GOODING, JAMES 2030017872	\$1,431,490.18

PENDING ANNUITY CONTRACTS

No results found.

BOOK OF BUSINESS BY PRODUCT



Once on the **Secure File Upload** page, users are able to upload documents to establish new accounts or service existing accounts for either Annuity or Mutual Fund accounts.

Secure File Upload

New File Upload

History

Use this process to securely submit your client requests for processing.

1. Enter the **client name**.
2. **Choose your document type**. (Only one client and one document type may be submitted at a time.)
3. **Choose your file(s)**. Check your total file(s) size before submitting your request to make sure the total doesn't exceed the stated limit

Client Name *

Document Type *

- Annuity – Establishing a New Account
- Annuity – Servicing an Existing Account
- Mutual Fund – Establishing a New Account
- Mutual Fund – Servicing an Existing Account

NEXT

Files Accepted

Users are allowed to upload:

- PDFs or JPGs (JPEGs)
- An unlimited number of files, but cannot exceed total upload size of 25 MB

All documents are screened for malicious files. Any documents that are not safe or exceed the maximum size will be rejected by the system.

Secure File Upload

New File Upload

History

Use this process to securely submit your client requests for processing.

1. Enter the **client name**.
2. **Choose your document type**. (Only one client and one document type may be submitted at a time.)
3. **Choose your file(s)**. Check your total file(s) size before submitting your request to make sure the total doesn't exceed the stated limit

Client Name : Patti Smith

Document Type: Annuity – Establishing a New Account

Choose File *

Choose Files No file chosen

Unlimited number of files can be uploaded to this field.

25 MB limit.

Allowed types: pdf jpg jpeg.

BACK

SUBMIT

Spamicide

Once the document has been uploaded, the user will receive a confirmation. Uploaded files will then be routed to the appropriate department for processing.

Secure File Upload

New File Upload

History

Use this process to securely submit your client information.

1. Enter the **client name**.
2. Choose your **document type**. (Only one client name per document type.)
3. Choose your **file(s)**. Check your total file(s) size against the upload limit.

Client Name *

Document was last saved: 5m ago

Document Type *

- Annuity – Establishing a New Account
- Annuity – Servicing an Existing Account
- Mutual Fund – Establishing a New Account
- Mutual Fund – Servicing an Existing Account

NEXT

Secure File Upload Complete

Select '**CLOSE**' to begin a new upload or '**HISTORY**' to view your previous submissions.

History

Close

Finally, users can review the uploaded documents by selecting the history tab.

Secure File Upload

New File Upload

History

Client Name	Document Type	Files	Completed
Randy Rhodes	Mutual Fund – Servicing an Existing Account	2	02/28/2023 - 08:11am CT
Robert Weir	Mutual Fund – Servicing an Existing Account	2	02/28/2023 - 08:10am CT
Vivian Campbell	Mutual Fund – Establishing a New Account	41	02/28/2023 - 08:04am CT
David Grohl	Mutual Fund – Servicing an Existing Account	2	02/28/2023 - 07:58am CT
Jack White	Mutual Fund – Establishing a New Account	1	02/28/2023 - 07:57am CT
James Page	Annuity – Servicing an Existing Account	2	02/28/2023 - 07:56am CT
Ernest Anastasio	Annuity – Establishing a New Account	2	02/28/2023 - 07:53am CT

Quick Links

- [Secure File Upload](#)
- [Client Accounts](#)
- [Sign In or Register](#)