

SUBSCRIBE®

Manage Your Annuity Business with Ease

Subscribe offers streamlined annuity sales and servicing, with access to many of the country's leading insurance companies. Easily network or link directly held annuity and life insurance information to an existing brokerage account on the BNY Pershing platform.

THE SUBSCRIBE ADVANTAGE

Subscribe complements your current investment and retirement planning products to help you deliver a comprehensive financial plan to your clients. Since retirement accounts can be used to consolidate qualified annuity positions, you can encourage your clients to consolidate additional assets under management.

Subscribe, integrated within NetX360®+, provides greater visibility into your business. Subscribe currently supports indexed, fixed, and variable annuities, term life, fixed universal and fixed whole life insurance contracts, as well as disability insurance. In addition, Subscribe provides a more holistic view of investors' portfolios allowing your advisors to function more efficiently and effectively.

Diverse product options and a variety of state regulations can make annuity transactions complex. In addition, annuity assets held outside of brokerage accounts can make it difficult to manage your clients' overall financial picture.

Subscribe's rules-driven order entry system and the ability to combine information on annuity assets held away into your clients' brokerage accounts solve both of these problems. The result is more in-good-order transactions and access to a complete picture of your clients' investment portfolios. Consolidated account information is available to you and your clients through NetX360+ and NetXInvestor®, our online investor platform, as well as on monthly brokerage statements.

Take advantage of Subscribe's online solutions and benefit from:

- Online annuity order entry
- eSignature capabilities
- Same-day money settlement
- Annuity and life consolidation
- Daily balance updates
- Faster commission settlement
- Robust performance reporting
- Post-sale commission processing capabilities through DTCC

Subscribe also supports fee-based annuities in managed accounts including the ability to:

- Purchase annuities online through our order entry system
- Network fee-based positions to brokerage accounts
- Leverage billing calculations to simplify accounting
- Generate performance reports

KEY FEATURES

- New annuity purchases
- Subsequent purchases
- 1035 exchanges and qualified transfers
- eSignature capabilities
- Document imaging to capture required annuity forms (R)
- Commission processing for annuity positions and life insurance contracts
- Linking of existing direct annuity positions and life insurance contracts
- Daily subaccount pricing and balances
- Same-day settlement
- Real-time order status
- Annuity reporting available through Report Center and Growth Dynamics (R)
- Smart forms wizard (R)
- Customizable suitability questions (R)
- Customizable work flow with up to 4 operational stops
- Intrusive alerts
- Online audit trail (R)
- Commission netting
- The Rules Engine™ (R)

PARTICIPATING CARRIERS*

Aegon Group - Transamerica Financial Life Insurance Company (Individual Annuity)	Prudential	Penn Mutual
Aegon Group - Transamerica Financial Life Insurance Company (Life Insurance)	Fidelity Investments Life Insurance Company	Principal
Aegon Group - Transamerica Life Insurance Company (Individual Annuity)	First Symetra National Life Insurance Company of NY	Protective
Aegon Group - Transamerica Life Insurance Company (Life Insurance)	Genworth	Pruco Life Insurance Company
Allianz	Global Atlantic	Prudential Life
Allstate	Great American Life	Reliance Standard Life Insurance Company
Allstate/Administered by Prudential	Great West Life & Annuity	Riversource Life Insurance Company
American General Life Ins Co/ AIG Annuities - Fixed and Index	Guaranty Income Life Insurance Company	S.USA Life Insurance Company Inc.
American General Life Ins Co/ AIG Annuities - Variable and Index	Guardian	Sanlam (Bermuda)
American General Life Ins Co/ AIG Annuities (se2)	Integrity	SBLI USA Life Insurance Company, Inc.
American National	Jackson	Security Benefit
Ameritas Life Insurance	Jefferson	Standard Insurance Company
Aspida Life Insurance Company	John Hancock	Sun Life
Athene Annuity & Life Company	Knighthood Annuity & Life	Symetra Life Insurance Company
Bankers Life and Casualty Company	Lincoln	Talcott Resolution Life Insurance Company
Brighthouse Life Insurance Company	Lincoln Life Assurance of Boston	The Capitol Life Insurance Company
CMFG Life Insurance Company	Massachusetts Mutual Life	The United States Life Insurance Co In The City of NY/ AIG Annuities - Fixed and Index
Delaware Life	Metropolitan Life Insurance Company	The United States Life Insurance Co/AIG Annuities - Variable
Eagle Life Insurance Company	Midland	United Life Insurance Company
Equitable	Minnesota Life/Securian Life	Universal Life
Everlake Life Insurance Company	Modern Woodmen of America	Vantis Life Insurance
Everlake Life Insurance Company/Administered by	National Western Life Insurance Company	Venerable
	Nationwide	Voya
	New York Life	Western-Southern Life Assurance Company
	North American Company for Life and Health Insurance	
	Oceanview Life and Annuity Company	
	Ohio National	
	Pacific Life	

*As of September 2024

(R) Requirements mandated by FINRA Rule 2330

To learn more about Subscribe, please contact your Relationship Team.

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WRQ-7340 Subscribe Fact Sheet_0824

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