

Annuity

SUITABILITY PRE-CHECK¹

Now available on
Annuity e-App²

North American's Pre-check is a new process that helps address missing information, errors, and concerns that could delay your application and cause rework.

How it works



If you choose Pre-check, it becomes the first step when you start an application on e-App. Simply complete the information, and submit to get your application pre-approved.



You'll hear back from us **within 48 business hours** with a review decision.



If approved, the Consumer profile section of your application gets **'locked in,'** and relevant information gets fed into the rest of the app.

You're almost there! Once you receive an acceptance email, you can complete the rest of the application within Annuity e-App.

How you benefit

- 1) Know upfront whether your Consumer profile form review will be approved by North American Suitability.
- 2) Your clients don't have to sign the Consumer profile form until the case review is approved, meaning you only have to get client signatures once.
- 3) Have a complex case? With Pre-check, we can let you know upfront whether your case will be approved.

Questions about Pre-check?

Contact North American's Suitability review team at **877-858-1364**.



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Does not apply to applications that require review by your broker dealer.

1. Review may be referred to as Best Interest in some states and company forms.

2. Suitability Pre-check only available through the e-App system.