

STREAMLINED ORDER ENTRY FOR ANNUITIES



AFFIRM® for Annuities is a dynamic compliance and order management system, offering the ultimate solution for managing various annuity transactions.

Our flexible architecture guarantees confident compliance and easily adapts to changes in rules, forms, and data transmission, enabling swift responses to evolving regulatory requirements.

This solution supports self-service capabilities without the need for software modifications, allowing for more effective management of your products, questions, rules, and forms.







With seamless integration capabilities, AFFIRM for Annuities connects with broker-dealers, BGAs/IMOs, third-party vendors, and other iPipeline solutions, including Laser App, AlphaTrust®, and InsureSight®. This ensures a cohesive workflow and maximizes operational efficiency.

Experience the next level of empowerment for distributors with AFFIRM for Annuities. Simplify your workflows and elevate compliance standards to lead the way in the financial services industry.

FEATURES

-  Self-service abilities for question management, forms mapping, and workflows
-  Supports industry standard files and formats from ACORD and Product Profile for Annuities (PPfAs) through our low-code/no-code solution
-  Supports in-force transactions covering withdrawals, systematic withdrawals, fund transfers, and rebalancing
-  Standard reporting and data analytics through InsureSight
-  Integrates with distributor systems including CRMs, licenses and appointments, book of business, and records systems
-  User-friendly interface for both fixed and variable products

BENEFITS

-  Ensures transactions in good order
-  Streamlines and automates the annuity sales process
-  Reduces time spent processing orders
-  Ensures full compliance with all necessary regulatory requirements through self-service tools
-  Assists PPfAs by making it easier to add new products and manage existing ones
-  Optimize consistency throughout the business by implementing standardized data capture, minimizing time investments



SCHEDULE A DEMO

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