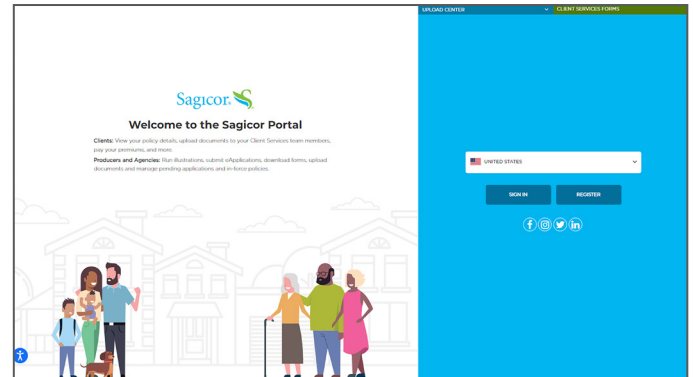


# HOW TO REGISTER FOR THE CLIENT PORTAL

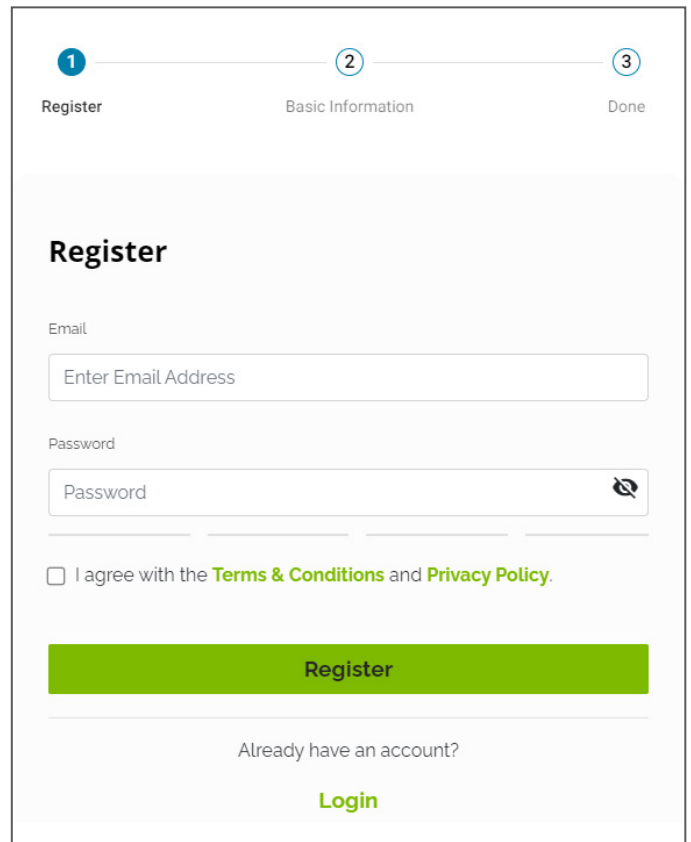
- 1 Start by visiting the Client Portal at [client.sagicor.com](https://client.sagicor.com).

**Note:** if you already have an account, you will still click **REGISTER**. Your region should be selected based on your location. If not, please choose the correct geographic location.



- 2 Next, enter your email address. This will be your new username associated with your account moving forward. Then enter your password, and check the box to agree to the Terms & Conditions and Privacy Policy. Once complete, click **Register**.

Your password must be at least 8 characters, a lowercase letter, an uppercase letter, a number, a symbol, and no parts of your username.




1 Register 2 Basic Information 3 Done

## Register

Email

Enter Email Address

Password

Password 

☐ I agree with the [Terms & Conditions](#) and [Privacy Policy](#).

**Register**

Already have an account?

[Login](#)

**3** To help us set up your account and grant you quick access, please provide us with some basic information.

- First Name
- Last Name
- Date of Birth

Then, hit **Submit**.

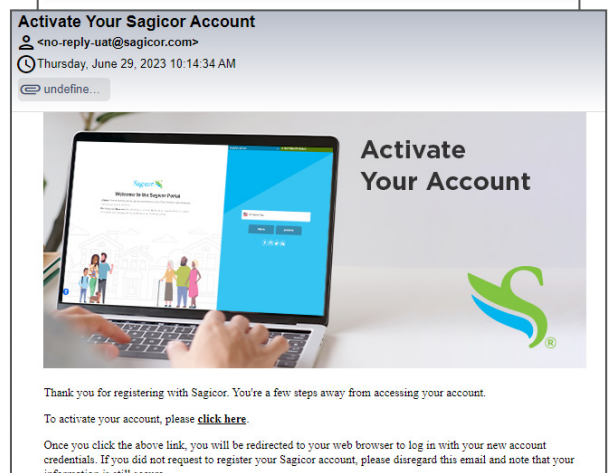
The screenshot shows a registration form with three steps: 1. Register, 2. Basic Information, and 3. Done. Step 2 is active. The form title is "Tell us about yourself". Below the title is a sub-header: "This will help us set up your account and grant you quick access." The form contains three input fields: "First Name", "Last Name", and "Date of Birth" (with a placeholder "mm/dd/yyyy"). At the bottom are two buttons: "Cancel" and "Submit".

**4** Congratulations! Now that your account has been created, there are just a few more steps to go.

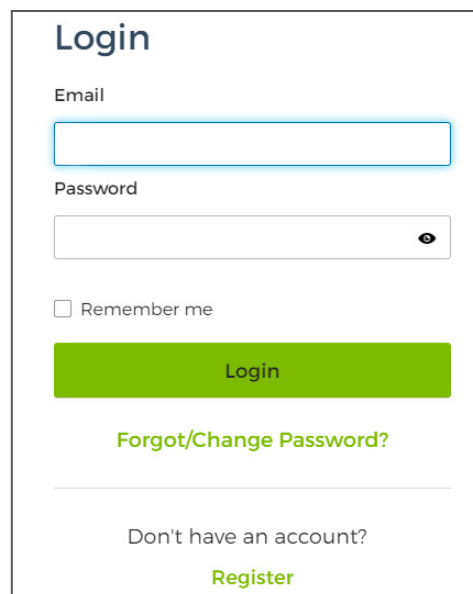
- First, check your inbox for the email that you used to register. It may take a minute or two. You can also hit the refresh button for your inbox.
- You will receive an email from **no-reply@sagicor.com**. The subject of this email will be **Activate Your Sagicor Client Portal Account**.

- Select **click here** to be redirected to your web browser with the login screen.

The screenshot shows a confirmation screen with three steps: 1. Register, 2. Basic Information, and 3. Done. Step 3 is active. A green checkmark icon is displayed above the heading "Account Created". Below the heading is the text: "Please check your email, **youremailaddress@email.com**. Click the **verification link** to confirm your email and gain access." Below this is a link: "Did not receive an email?". At the bottom is a green button labeled "Resend verification link".



- 5** Log in with your new account credentials (email and password you previously provided).

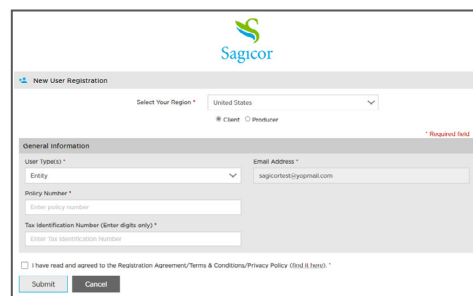
A screenshot of the Sagicor login page. At the top is the 'Login' heading. Below it are two input fields: 'Email' and 'Password'. The password field has an eye icon to toggle visibility. Below the password field is a checkbox labeled 'Remember me'. A large green 'Login' button is centered below these fields. Underneath the button is a green link that says 'Forgot/Change Password?'. At the bottom of the form is a link that says 'Don't have an account? Register'.

- 6** Please enter the following information:
- User type(s)
  - Policy number
  - Social Security number (or Tax Identification number, if registering as an entity)
  - Date of birth (for Individual user types only)

Next, check the box to agree to the Terms & Conditions and Privacy Policy.

Then, click **Submit**.

**That's it; you've completed the registration process, and your account and its details now have enhanced security features.**

A screenshot of the 'New User Registration' form for an individual. The form has a header with the Sagicor logo and a 'Select Your Region' dropdown set to 'United States'. Below this is a section for 'General Information' with fields for 'User Type(s)' (set to 'Individual'), 'Email Address' (sagicorlife@gmail.com), 'Policy Number', 'Date of Birth', and 'Social Security Number'. There is a checkbox for 'I have read and agreed to the Registration Agreement/Terms & Conditions/Privacy Policy'. At the bottom are 'Submit' and 'Cancel' buttons.A screenshot of the 'New User Registration' form for an entity. The form is similar to the individual one, but the 'User Type(s)' dropdown is set to 'Entity'. The 'Social Security Number' field is replaced by a 'Tax Identification Number' field. The 'Date of Birth' field is also present. The 'Submit' and 'Cancel' buttons are at the bottom.

## Need additional support?

If you have questions or need assistance, please email us at [clientservices@sagicorlifeusa.com](mailto:clientservices@sagicorlifeusa.com), or call **888-724-4267, extension 4610**.

Products issued by Sagicor Life Insurance Company. Home Office: Scottsdale, AZ. Products not available in all states, and state variations may apply. Sagicor does not provide tax or estate planning advice. You should consult with your tax advisor(s). Annuities and life insurance products have limitations and restrictions, including surrender charges. Sagicor issues other fixed annuities and life insurance products with similar features, benefits, limitations and restrictions. Contact Sagicor for more information.

Sagicor is rated "A-" (Excellent) by A.M. Best Company (4<sup>th</sup> best out of 16 possible ratings), affirmed as of November 4, 2021. Rating and guarantees based on claims-paying ability of issuing insurer.