Special Product Quick Reference Guide

Overview

This is a quick reference guide of special or unusual products that may have unique rules or procedures for handling requests. Some products are serviced by the main home office, some are serviced by a small internal team, and some are serviced by another organization not within the home office.

Each product has multiple tabs with links to other existing resources for more details on procedures, such as authentication and servicing requests.

Tip: For warm transfers, refer to NLG Policy Numbering Scheme for Warm Transfers for how to connect a caller to the appropriate team.

Tip: For policies serviced by NLG/home office, refer to Policy Number Conventions for how to look them up in Mainframe and/or OnBase.

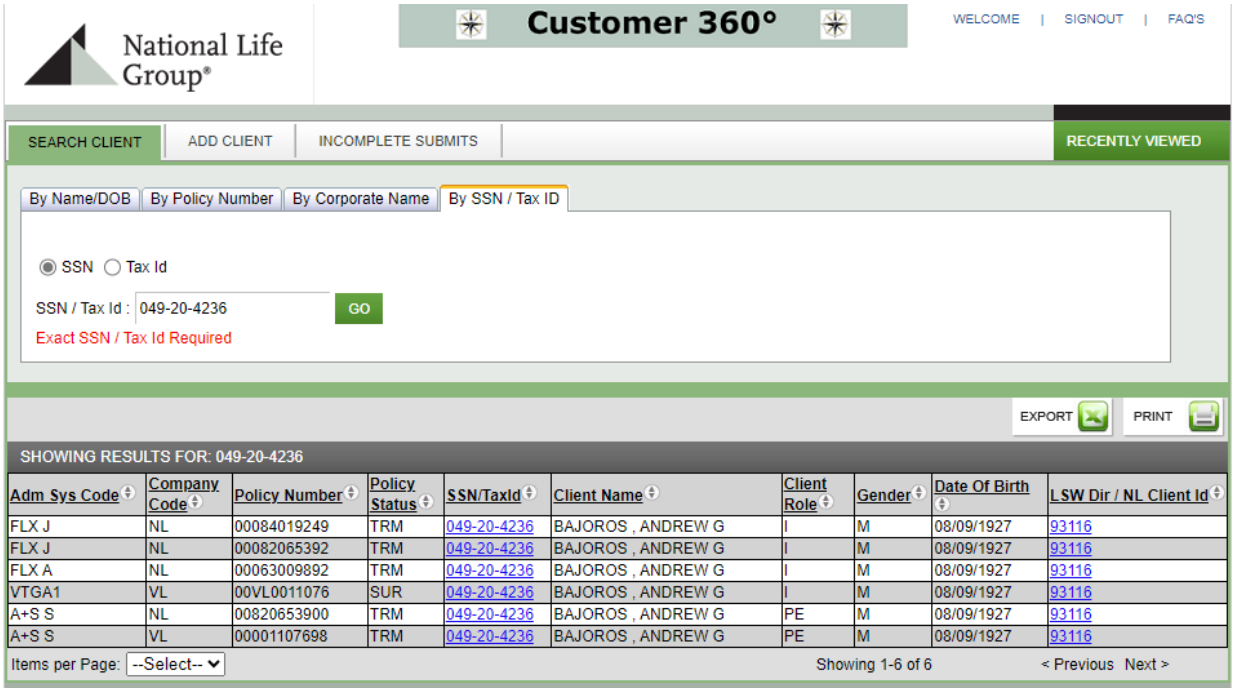
Procedure

Overview

An Annuity and Supplementary (A+S) contract is a contractual agreement between a policy owner or beneficiary and a life insurance company. The policy holder or beneficiary chooses to have benefit paid out over a period of time based upon contract options available at the time of death or settlement. Policy owners can request disbursements and policy changes, and they can modify banking information and payment details.

To identify an A+S policy, look up the customer's Social Security Number in Customer360 or Client Index, in Mainframe.

In the example below, the customer has two A+S policies.

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DIALOG: CADINQ20  N A T I O N A L  L I F E  O F  V E R M O N T      PAGE: 0001
  DATE: 03/15/24           C L I E N T  S Y S T E M                TIME: 13:01
                             CONTRACT LIST
[redacted]
      CLI 000093116 SSN 049-20-4236 TID    -        DOB [redacted] SEX M  REI N
 24 ASCOLESE RD
 TRUMBULL,CT   066112331                          ST 08 CITY 000 TAX CODES
       CO    SYS   REL STS STS DATE  EFF DATE    POLICY       GROUP    AGY AGENT
_ I   NL    A+S S PED TRM 993/08/01 993/08/01 00820653900                016 00000
_     NL    FLX A I   TRM 982/12/30 963/06/01 00063009892 A000340      016 12251
_     NL    FLX J I   TRM 993/08/13 982/06/01 00082065392 D000340      016 91159
_     NL    FLX J I   TRM 985/12/02 984/06/01 00084019249 A000340      016 12251
_ I   VL    A+S S PED TRM 993/08/01 993/08/01 00001107698                016 00000
_     VL    VTGA1 I   SUR 993/08/01 987/06/01 00VL0011076  0000340     016 91159




BYE/CLEAR HELP/PF1 SYSHELP/PF2  RTRN/PF3 EXIT/PF4 UP/PF7  DOWN/PF8 FIRST/PF9
NAMMAINT/PF5 ADRMAINT/PF6 BENUPI/PF17 BENUPM/PF18 BENSUMM/PF19 MBRINQ/PF22

RESPONSE:          SEND DATA-->                                MODE: FAST
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Authenticating Policy Owners

[Caller Authentication Procedures]

Viewing Policy Information

Policy Number Format: Numeric only

OnBase > Client Policy and Claim Search

A+S Quick Reference Guide.pdf

Handling Requests

Working With Annuity and Supplemental (A&S) Policies

Email Disbursements@nationallife.com

A+S Quick Reference Guide.pdf

Special Rules:

Title: Owner or beneficiary changes cannot be made on these contracts. The contract specifies how the payments should be paid. Then, if they have questions on the rights of the Payee, that would be directed to title.

Overview

Disability policies starting with NLD are not serviced by the home office.

These policies are serviced by UNUM. The customer or agent must call 800-648-6633 (Option 2 for Claims and Option 3 for Service).

Authenticating Policy Owners

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Viewing Policy Information

Policy Number Format: NLDXXXXXX

Disability policies starting with NLD are not serviced by the home office.

These policies are serviced by UNUM. The customer or agent must call 800-648-6633 (Option 2 for Claims and Option 3 for Service).

Handling Requests

Disability policies starting with NLD are not serviced by the home office.

These policies are serviced by UNUM. The customer or agent must call 800-648-6633 (Option 2 for Claims and Option 3 for Service).

Overview

Disability policies that are numeric only are serviced by the home office.

They function similarly to Term policies in that they have a set premium that is not flexible, they do not build cash value, and they have a short grace period of 30-60 days before they lapse. The premium amounts on disability policies can change, as when the insured turns 65, some coverages may be removed, or may increase on an annual basis after that point.

Authenticating Policy Owners

Proceed with standard authentication practices.

Biometric Authentication Procedures

Caller Authentication Procedures

Viewing Policy Information

Policy Number Format: XXXXXXX or DXXXXXXX

Mainframe > Trad system

RNVD, RECD, ADID, ADTD

OnBase > Application File General

Viewing Disability Policy Information

Handling Requests

Requests are processed by the home office through the usual methods, including Salesforce requests and email inboxes.

Special Rules

Billing: Disability policies may not be billed monthly. Options are annual, semi-annual, or quarterly billing, or annual, semi-annual, quarterly, or monthly EFT.

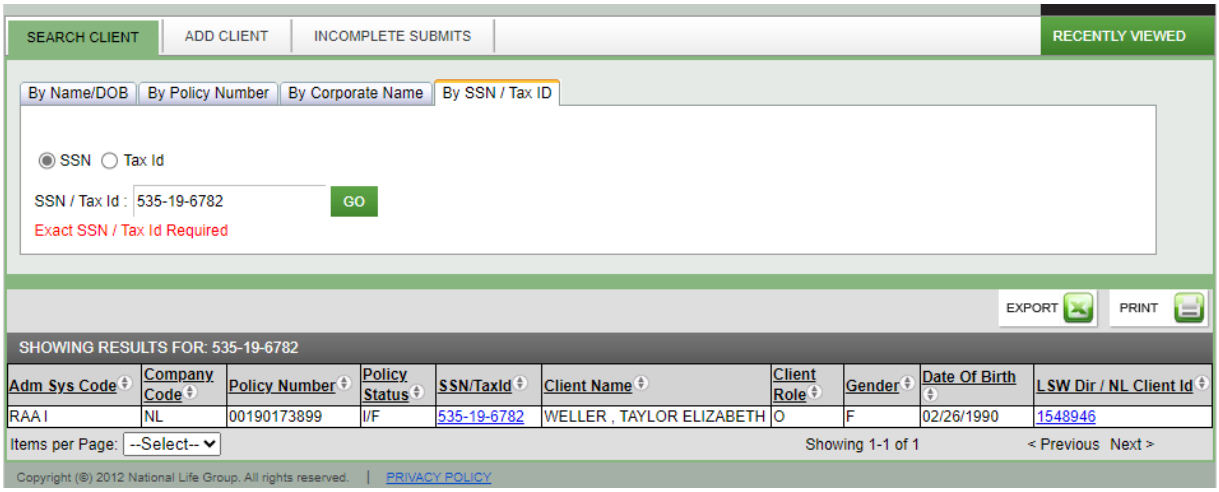
Title: Disability policies do not have a death benefit; therefore, they do not have a beneficiary. The only time a beneficiary is designated on a disability income policy is when the policy contains principal sum accident coverage or accidental death and dismemberment.

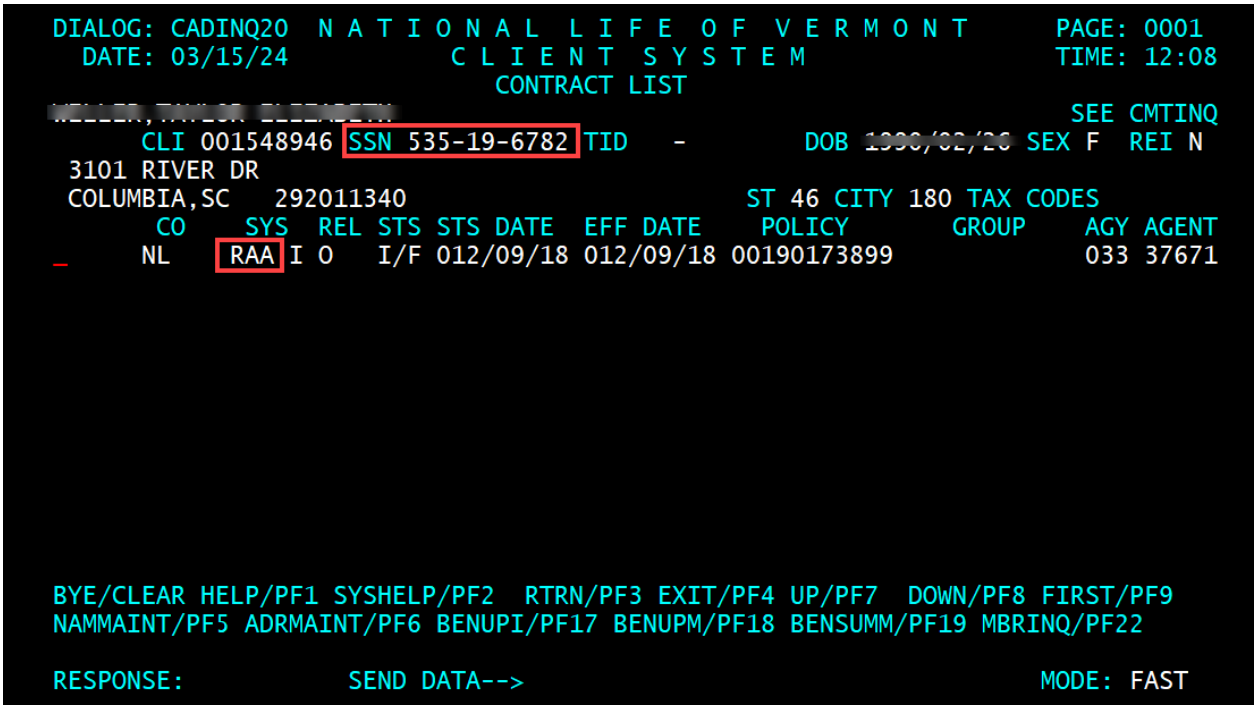
Overview

Reserved Asset Accounts, also referred to as Secure Plus Access, are not serviced by the home office. They are essentially a backup supply of funds that were set aside by a customer in case their business needs extra cash in the future.

These policies are serviced by BNY Mellon. The customer or agent must call 844-366-6809.

To identify a Reserved Asset Account, look up the customer's social security number in Customer360 or Client Index, in Mainframe.





Authenticating Policy Owners

Reserved Asset Accounts, also referred to as Secure Plus Access, are not serviced by the home office.

These policies are serviced by BNY Mellon. The customer or agent must call 844-366-6809.

Viewing Policy Information

Policy Number Format: Numeric only

Reserved Asset Accounts, also referred to as Secure Plus Access, are not serviced by the home office.

These policies are serviced by BNY Mellon. The customer or agent must call 844-366-6809.

Handling Requests

Reserved Asset Accounts, also referred to as Secure Plus Access, are not serviced by the home office.

These policies are serviced by BNY Mellon. The customer or agent must call 844-366-6809.

Special Rules

Title: If a beneficiary change is received, it would be sent to claims to handle. It is not recorded. It is considered a change in payout.

Overview

3121 plans are serviced by National Life, but they are not National Life Group policies. 3121s are alternative retirement plans for part time, temporary, and seasonal workers. These plans are owned by the employer, in many cases being a state department, such as the state of Hawaii.

Authenticating Policy Owners

Authentication is not available in Salesforce. Use the below link to access the annuitant information in Mainframe.

Locating Distributions on 3121 Plans

Viewing Policy Information

Policy Number Format: No policy number. Lookup using annuitant's SSN only.

Mainframe > RPS System

Locating Distributions on 3121 Plans

OnBase > Life and Annuity Client Files

Locating 3121 Information in OnBase

Handling Requests

Logging 3121 or RPS Policy Calls

Requests are handled by the annuity outbound payment team. Email requests to outboundpaymentcenter@nationallife.com.

Overview

Interest Sensitive Whole Life policies, also referred to as EXP policies, are serviced by the home office. They are permanent life insurance policies that earn interest instead of earning dividends like most other whole life products.

Interest Sensitive Whole Life (EXP) Policies

Authenticating Policy Owners

Proceed with standard authentication practices.

Biometric Authentication Procedures

Caller Authentication Procedures

Viewing Policy Information

Policy Number Format: VL00XXXX

Salesforce, OnBase, EFT Maintenance, and most other systems function the same as a typical universal life policy.

Mainframe > NL vtg2 system. Use vtg2 instead of the vtg1. Once in the vtg2 system, all other screens function the same as a typical universal life policy.

Interest Sensitive Whole Life (EXP) Policies

Status code on SUPR screen:

K = moved to extended Term insurance

J = Reduced Paid Up Policy

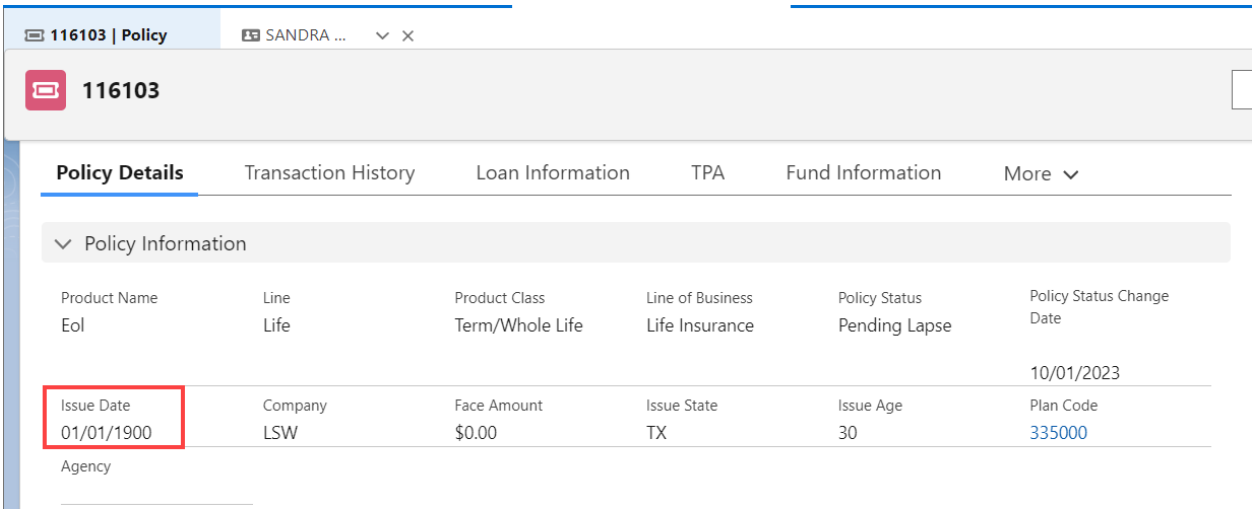
Handling Requests

Requests are processed by the home office through the usual methods, including Salesforce requests and email inboxes.

Overview

Life insurance policies that were previously owned by Life of the Southwest prior to its acquisition by National Life of Vermont are maintained and serviced by a small team within the home office, in the Title Department. These policies are commonly referred to as "Old Block" or "Closed Block".

These policies are easily identified by the **1/1/1900** issue date found in Salesforce.



Authenticating Policy Owners

Proceed with standard authentication practices.

Biometric Authentication Procedures

Caller Authentication Procedures

Viewing Policy Information

Requests for policy information are best routed to extension x9278.

If necessary, policy information can be accessed in **OnBase > LSWContracts** and in **Mainframe > LSW vtg1 system**.

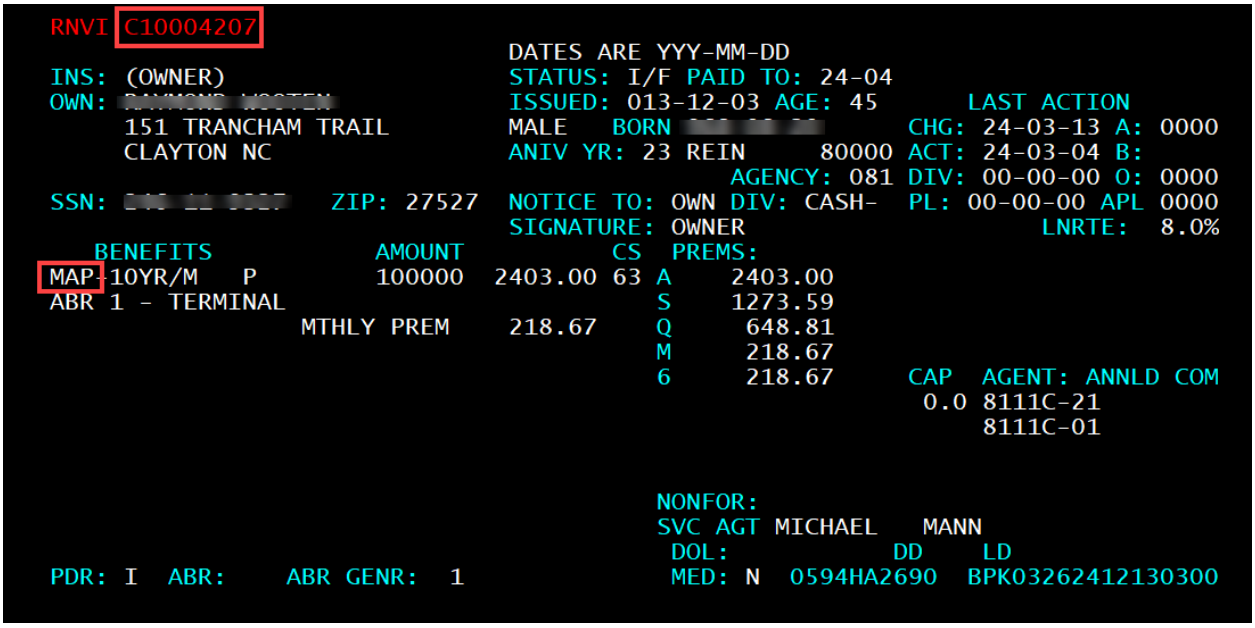
Handling Requests

After caller authentication, warm transfer the policy owner to extension x9278 for any requests or inquiries.

Overview

Consecta policies were a special Term product that are no longer sold, but many still exist and continue to be serviced by the home office.

They are identified by a C beginning the policy number and the **MAP** product type.



Authenticating Policy Owners

Proceed with standard authentication practices.

Biometric Authentication Procedures

Caller Authentication Procedures

Viewing Policy Information

Policy Number Format: CXXXXXXXX

Policy information can be accessed in all of the standard systems, including Salesforce, Mainframe, OnBase, and EFT Maintenance.

Handling Requests

Requests are processed by the home office through the usual methods, including Salesforce requests and email inboxes.

Special Rules

EFT: Consecta policies may be paid by a debit card, unlike all other National Life products which do not allow any type of card payments. If possible, the customer should be encouraged to use our regular EFT system for ACH payments from their bank account. If a customer is determined to use the debit card system, contact a Team Lead of the Life Inbound Payment Center to process the request.

Contract Change: Consecta policies are not convertible. At the end of their guaranteed period, the premium increases on an annual basis, and the customer may choose to continue at the increased premium or terminate the policy.

Overview

There are multiple types of Flex annuities.

Flex ABC, PBC, PML, PMS, PRT, and YRT

Series L means product is Pension Maximizer Long (PML)

Series S means product is Pension Maximizer Short (PMS)

No Series means product is Pension Builder Contract (PBC)

A policy found on the RNVA screen means the product is Annuity Builder Contract (ABC).

Authenticating Policy Owners

Proceed with standard authentication practices.

Biometric Authentication Procedures

Caller Authentication Procedures

Viewing Policy Information

Policy Number Format: 7-digit number beginning with 6, 7, or 8.

OnBase > App File General

Mainframe > Trad Flex

RNV J/Y/A	General inquiry, shows policy details.
PQT J/Y/A	Policy values
REC J/Y/A	Payment/transaction history
ADT J/Y/A	Address information

Handling Requests

Requests are processed by the home office through the usual methods, including Salesforce requests and email inboxes.

Tip: Refer to the Annuity QRC (Blue Card) for product specifications including guaranteed interest rates, surrender penalties, contribution limits, and more!

Overview

Corporate Owned Life Insurance (COLI) are a small block of business administered and serviced by one internal teammate in the life inbound payment center. These policies exist only in OnBase and the COLI system. For all requests and inquiries, please refer the caller to Don Henry.

Authenticating Policy Owners

These policies exist only in OnBase and the COLI system. For all requests and inquiries, please refer the caller to Don Henry.

Viewing Policy Information

Policy Number Format: NLVXXX/COXXXXXXX

The **NLV** portion is referred to as the case number, while the **CO** portion is referred to as the policy number.

These policies exist only in OnBase and the COLI system. For all requests and inquiries, please refer the caller to Don Henry.

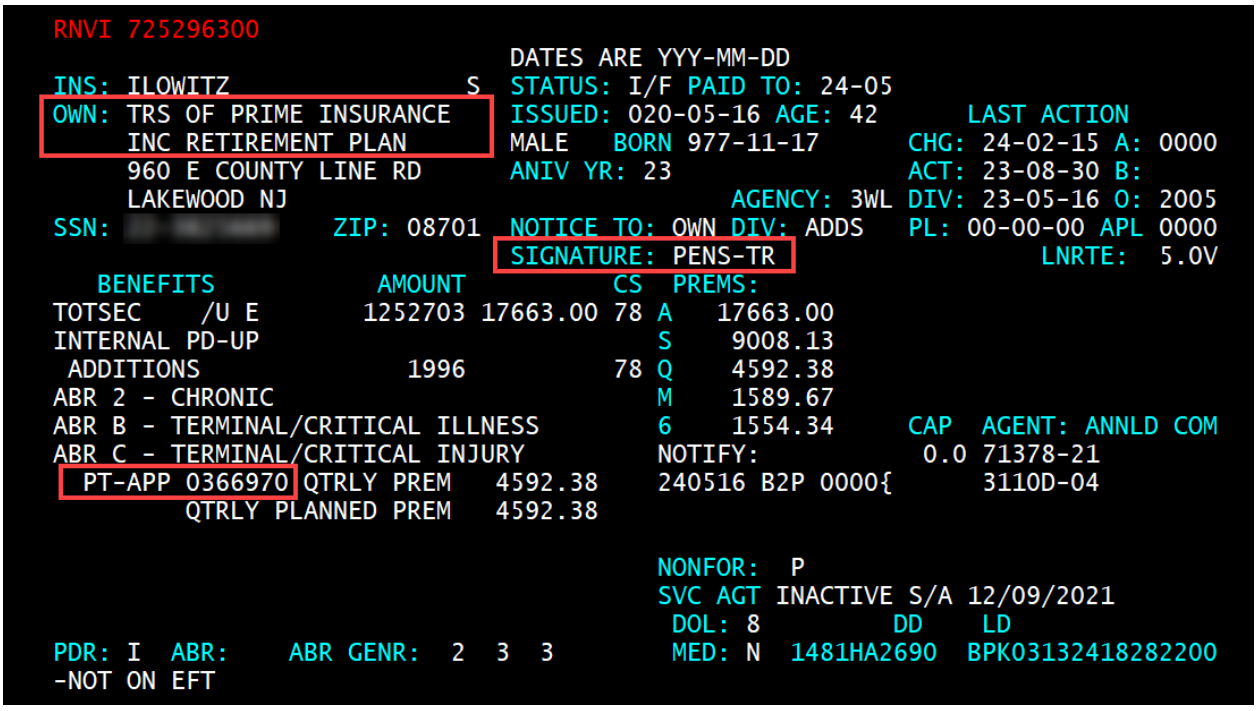
Handling Requests

For all requests and inquiries, please refer the caller to Don Henry.

Overview

Pension plans are policies owned by a pension. Policies owned by a pension may be any product or insurance type, including term, whole life, universal life, flex annuities, and other annuities.

Policies under a pension plan can be identified by the owner, the signature code, and the presence of a group/pension code, as shown below.



Authenticating Policy Owners

Proceed with standard authentication practices.

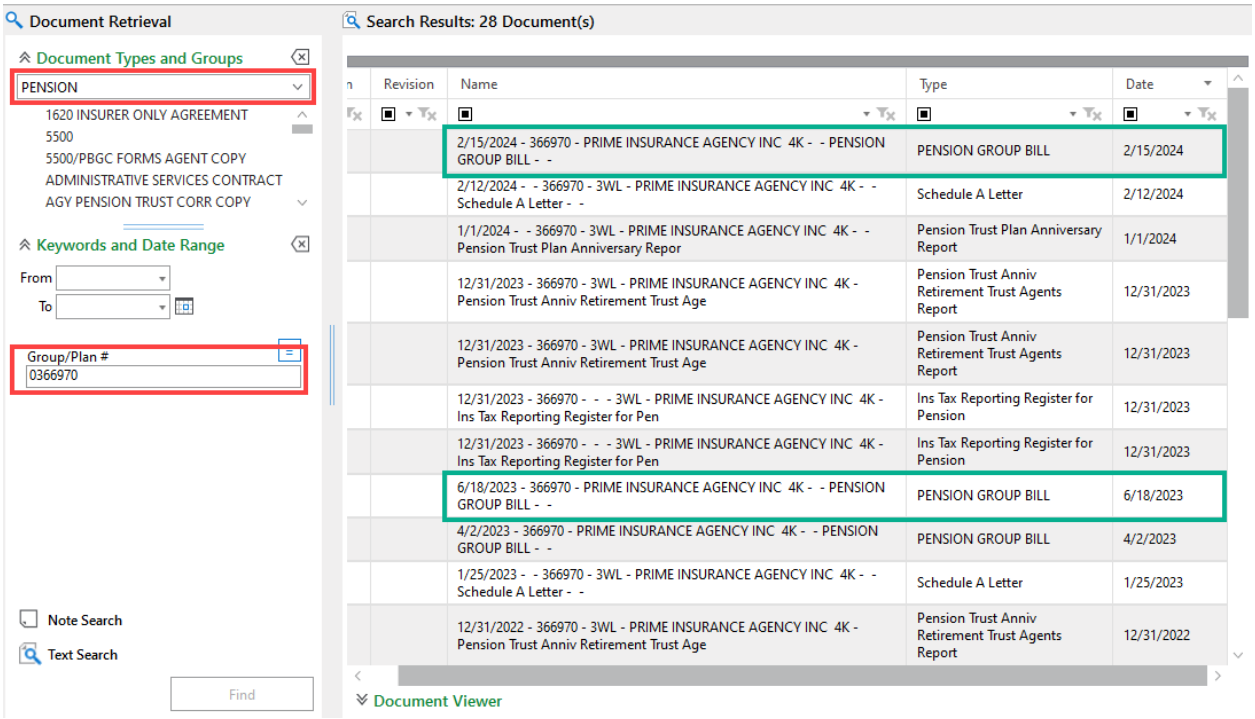
Biometric Authentication Procedures

Caller Authentication Procedures

Viewing Policy Information

Policy information can be accessed in all of the standard systems, including Salesforce, Mainframe, OnBase, and EFT Maintenance.

Additionally, the group/pension code can be located in Mainframe and used to search in **OnBase > Pension** to locate bills and annual reports for the plan.



Handling Requests

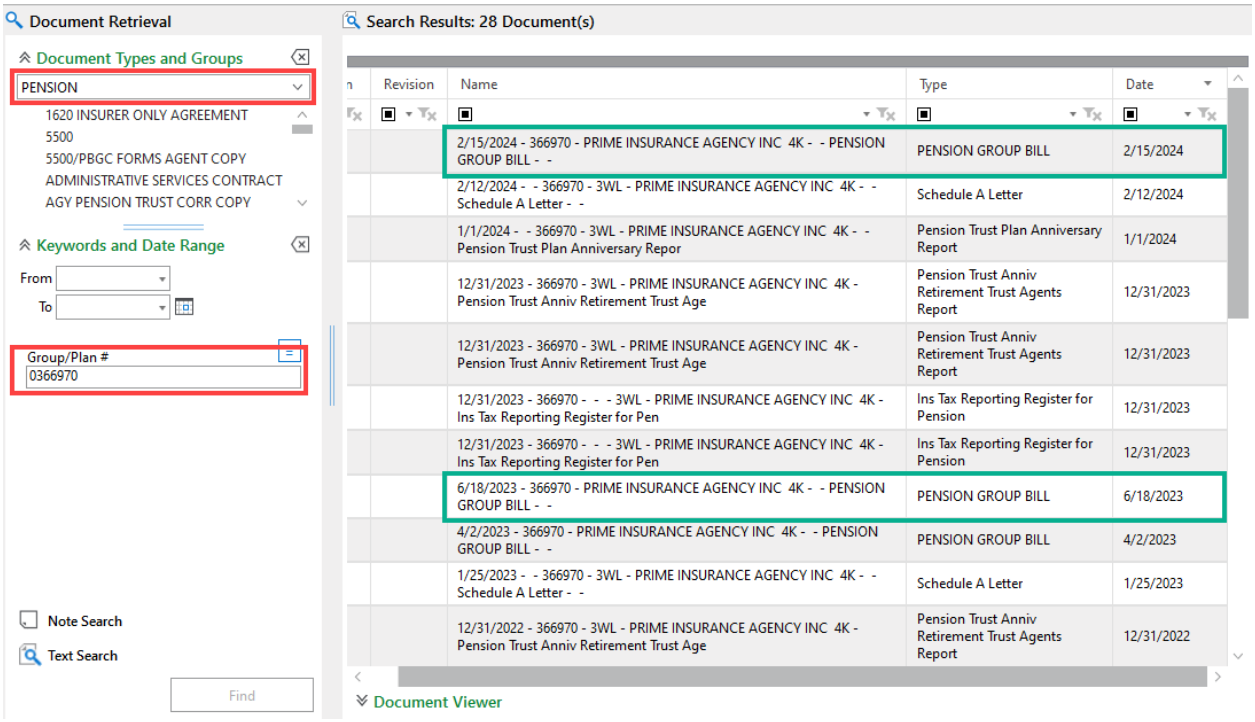
Inbound Payment or Billing requests can be emailed to groupbill-life@nationallife.com or requested through Salesforce.

All other requests are processed by the home office through the usual methods, including Salesforce requests and email inboxes.

Special Rules

Title: The ownership cannot be changed from a pension to an individual. The policy would need to be surrendered or replaced with a new policy in order to have a different owner. Likewise, the beneficiary of any policies owned by a pension plan must be the plan itself and cannot be changed. Pension plans cannot be collaterally assigned.

Billing: Pension bills and annual reports can be found in OnBase. Choose **Pension** from the drop-down menu. Search the plan code to locate bills and annual reports for the pension plan.



Overview

Variable policies may be life insurance or annuities. Unlike all other universal life policies, they have their cash value invested in funds directly in the stock market. This means the investments may gain or lose value, depending on the market performance. Because the cash value changes daily, all financial transactions must be processed same-day. These policies are handled with the highest priority.

Authenticating Policy Owners

Proceed with standard authentication practices.

Biometric Authentication Procedures

Caller Authentication Procedures

Viewing Policy Information

Policy Number Format: NL5XXXXXX or NL9XXXXXX or NL8XXXXXX

Policy information can be accessed in all of the standard systems, including Salesforce, Mainframe, OnBase, and EFT Maintenance.

When accessing the policy values in Mainframe, be sure to use the previous day's effective date. If the current date is used, no values will be shown, because the system does not know what today's values are until the following morning.

Handling Requests

All financial transactions must be processed same-day; these policies are handled with the highest priority.

Billing: Be aware of **Variable Fund Change / Allocation Change** requests, also referred to as ***Trades***. These requests come in a few forms: a wet-signed paper form 9355, an emailed copy of a wet-signed form 9355, or a phone request from an authorized individual.

9355 forms are handled by the life billing team, but they are sometimes received by a different department. Any of these requests must be immediately forwarded to lifebilling@nationallife.com for same-day processing. Below is an example of a completed 9355 form.

National Life Group®

National Life Insurance Company®

Variable Product Fund Management Change Request

Owner's Name: [redacted] Policy No.: [redacted]

Mail completed form to: Premium Billing - M315

A. Complete the following if applicable

1. ☐ I elect to change future premium allocations and understand that Portfolio Rebalancing will terminate, unless I request to Continue in C.
2. ☐ I elect to transfer existing value based on the new premium allocations. *(Complete B)*
3. ☐ I elect to transfer existing value. *(Not applicable if #2 checked.) (Complete D on the reverse side)*

B. Premium Allocation Change for Future Premiums

Use whole numbers. Must total 100%.

AB
- VPS Discovery Class A: ___ %
- VPS International Value Class A: 20 %
- VPS Relative Value: ___ %
- VPS Sustainable International Thematic: ___ %

Alger
- Capital Appreciation: 10 %
- Large Cap Growth: ___ %
- Small Cap Growth: ___ %

Allspring Global Investments
- Allspring VT Discovery Fund +: 5 %
- Allspring VT Opportunity Fund +: ___ %

American Century
- VP Disciplined Core Value+: ___ %
- VP Inflation Protection: ___ %
- VP International: ___ %
- VP Ultra Class 1 +: ___ %
- VP Value Class 1: ___ %

BNY Mellon
- Sustainable U.S. Equity +: ___ %
- VIF Appreciation +: ___ %
- VIF Opportunistic Small Cap +: ___ %

DWS
- CROCI U.S. VIP +: ___ %
- Small Cap Index VIP: ___ %
- Small Mid Cap Value VIP: ___ %

Fidelity
- VIP Contrafund: ___ %
- VIP Equity-Income: ___ %
- VIP Government Money Market ‡: ___ %
- VIP Growth: ___ %
- VIP High Income: ___ %
- VIP Index 500: ___ %
- VIP Investment Grade Bond: ___ %
- VIP Mid Cap: ___ %
- VIP Overseas: ___ %
- VIP Value Strategies: ___ %

Franklin Templeton
- Franklin Global Real Estate VIP +: ___ %
- Franklin Mutual Global Discovery VIP: ___ %
- Franklin Mutual Shares VIP: ___ %
- Franklin Small Cap Value VIP: ___ %
- Franklin Small-Mid Cap Growth VIP: ___ %
- Franklin U.S. Government Sec. VIP: ___ %
- Templeton Foreign VIP: ___ %

Invesco
- Invesco Oppenheimer V.I. Conservative Balanced: ___ %
- Invesco Oppenheimer V.I. Discovery Mid Cap +: ___ %
- Invesco Oppenheimer V.I. Global Strategic Income: ___ %
- Invesco Oppenheimer V.I. Main Street Small Cap: ___ %
- V.I. Health Care+: ___ %
- V.I. Technology +: ___ %

Lincoln
- LVIP JP Morgan Small Cap Core +: ___ %

National Life Insurance Company**
- ~ Preserver 3 Year: ___ %
- ~ Preserver 5 Year: ___ %
- ~ Preserver 7 Year: ___ %
- ~ Preserver 10 Year: ___ %
- Fixed Account: ___ %

Neuberger Berman
- AMT Short Duration Bond: ___ %
- AMT Sustainable Equity Class I: ___ %
- AMT Mid-Cap Growth Class I: ___ %
- AMT Mid-Cap Growth Class S +: ___ %

Touchstone
- TVST Balanced: ___ %
- TVST Bond: 15 %
- TVST Common Stock: 30 %
- TVST Small Company: 15 %

T. Rowe Price
- Blue Chip Growth: ___ %
- Equity Income: ___ %
- Health Sciences#: 5 %
- Moderate Allocation: ___ %

VanEck
- VIP Emerging Markets Class I: ___ %
- VIP Global Resources Class I: ___ %
- VIP Emerging Markets Bond Class I: ___ %

~ *Preserver Accounts VA Only*
** *NLIC Preserver & Fixed/General Accounts subject to state approval*
\+ *N/A for Investor Select*
‡ *N/A for Sentinel Estate Provider*
# *N/A unless value currently exists in this fund*

C. Portfolio Rebalancing

☐ Continue ☐ Add ☐ Cancel
☐ Annual* ☐ Semi-Annual ☐ Quarterly* **(*Not available for VariTrak or Investor Select)**

Automatically rebalances the value in the variable sub-accounts based on the premium allocation percentages in effect at the time of rebalancing.

The first transfer will occur as of the monthly Policy date on or next following the date we receive the request at our Home Office with subsequent transfers at the selected frequency.

National Life Group® is a trade name of National Life Insurance Company (NLIC) and its affiliates.
National Life Variable Contracts distributed by Equity Services, Inc., Member FINRA/SIPC, Broker/Dealer Affiliate of NLIC.

Centralized Mailing Address: One National Life Drive, Montpelier, VT 05604 | P: 800-732-8939 | www.NationalLife.com

Variable Product Fund Management Change Request - Continued

D. Transfer Existing Value *Use whole percentages or dollars. Transfers from the Fixed Account are limited to once each contract year between Jan. 1 and Feb. 15 (VA Only). If the value in the sub-account, on the date received, is less than the requested dollar amount, the transaction will be processed for the amount available.*

	*$ or % to Transfer From	$ or % to Transfer To
AB		
VPS Discovery Class A		
VPS International Value Class A		100 %
VPS Relative Value		
VPS Sustainable International Thematic	100 %	
Alger		
Capital Appreciation		
Large Cap Growth		
Small Cap Growth		
Allspring Global Investments		
Allspring VT Discovery Fund +		
Allspring VT Opportunity Fund +		
American Century		
VP Disciplined Core Value +		
VP Inflation Protection		
VP International		
VP Ultra Class 1 +		
VP Value Class 1		
BNY Mellon		
Sustainable U.S. Equity +		
VIF Appreciation +		
VIF Opportunistic Small Cap +		
DWS		
CROCI U.S. VIP +		
Small Cap Index VIP		
Small Mid Cap Value VIP		
Fidelity		
VIP Contrafund		
VIP Equity-Income		
VIP Government Money Market ‡		
VIP Growth		
VIP High Income		
VIP Index 500		
VIP Investment Grade Bond		
VIP Mid Cap		
VIP Overseas		
VIP Value Strategies		
Franklin Templeton		
Franklin Global Real Estate VIP +		
Franklin Mutual Global Discovery VIP		
Franklin Mutual Shares VIP		
Franklin Small Cap Value VIP		
Franklin Small-Mid Cap Growth VIP		
Franklin U.S. Government Sec. VIP		
Templeton Foreign VIP		

	*$ or % to Transfer From	$ or % to Transfer To
Invesco		
Invesco Oppenheimer V.I. Conservative Balanced		
Invesco Oppenheimer V.I. Discovery Mid Cap +		
Invesco Oppenheimer V.I. Global Strategic Income		
Invesco Oppenheimer V.I. Main Street Small Cap		
V.I. Health Care +		
V.I. Technology +		
Lincoln		
LVIP JP Morgan Small Cap Core +		
Neuberger Berman		
AMT Short Duration Bond		
AMT Sustainable Equity Class I		
AMT Mid-Cap Growth Class I		
AMT Mid-Cap Growth Class S +		
National Life Insurance Company**		
~ Preserver 3 Year***		
~ Preserver 5 Year***		
~ Preserver 7 Year***		
~ Preserver 10 Year***		
Fixed Account/General Account		
Touchstone		
TVST Balanced		
TVST Bond		
TVST Common Stock		
TVST Small Company		
T. Rowe Price		
Blue Chip Growth		
Equity Income		
Health Sciences#		
Moderate Allocation		
VanEck		
VIP Emerging Markets Class I		
VIP Global Resources Class I		
VIP Emerging Markets Bond Class I		

~ Preserver Accounts VA Only

* If 25%, then 25% of the total value in the sub-account will be transferred

** NLIC Preserver & Fixed/General Accounts subject to state approval

*** $500 min. Deficient amounts will default to Fidelity VIP Government Money Market. Transfers out prior to the end of the guaranteed period may result in a Market Value Adjustment.

+ N/A for Investor Select

‡ N/A for Sentinel Estate Provider

N/A unless value currently exists in this fund

Variable Product Fund Management Change Request - Continued

E. Telephone Transaction Privilege/Limited Power of Attorney (LPOA)

☐ Add ☐ Cancel

I authorize the Company to accept telephoned requests by:

☑ Owner

☑ Registered Representative *(named below)*

[redacted]

- Transfer unloaned Accumulated Value among the Fixed Account and sub-accounts of the Separate Account; and
- Change the premium allocation percentages; and
- Add/Change/Cancel Dollar Cost Averaging and Portfolio Rebalancing features; and
- Request loans up to $10,000 for 403(b) Tax Sheltered Annuities *(VA)*; and
- Effect policy loans up to $25,000 *(VariTrak & Investor Select only)*; and
- Change an existing systematic withdrawal *(VA only)*

F. Change Monthly Deductions *(Not applicable for VA)*

☐ from Fixed/Gen. Account & all sub-accounts of Separate Account in proportion to the distribution of the Accumulated Value on date of deduction.

☐ from the Money Market sub-account to the extent the Accumulated Value in such sub-account is sufficient to pay charges.

G. Agreement

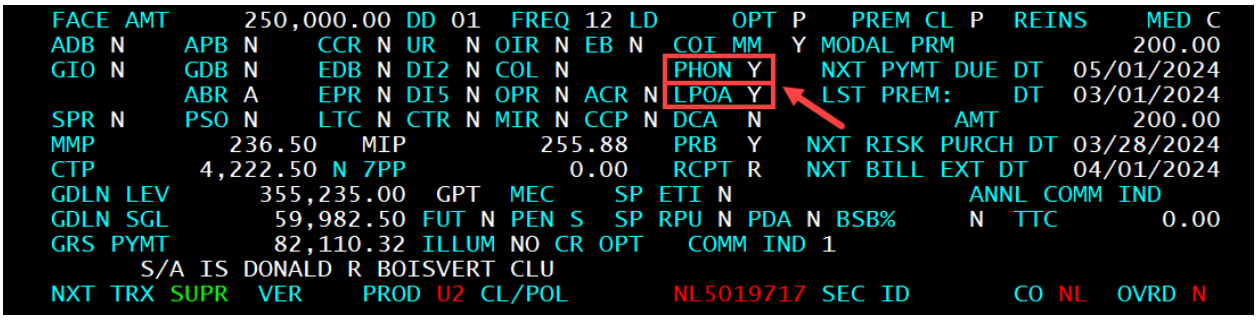
I understand that the requested change(s) will take effect when this form, properly executed, is received at the Home Office of National Life Insurance Company (the Company) in Montpelier, Vermont. If the New York Stock Exchange (NYSE) is closed on the date this form is received, it will be deemed received on the next date that the NYSE is open. If it is delivered to the Home Office after the closing of the NYSE, it will be deemed received on the following day. If the Telephone Transaction Privilege has been elected, I appoint the Company as my agent to act upon telephoned instructions reasonably believed to be authorized by me. I hereby ratify any telephoned instructions so given and consent to the tape recording of these instructions. So long as the Company employs reasonable procedures to confirm that the instructions are genuine, I agree that I will not hold the Company liable for any unauthorized telephoned instructions.

Owner Signature/Date: [redacted] Telephone Number: [redacted]

X1

To check if a caller is authorized to make phone trades, access the SUPR screen in Mainframe.

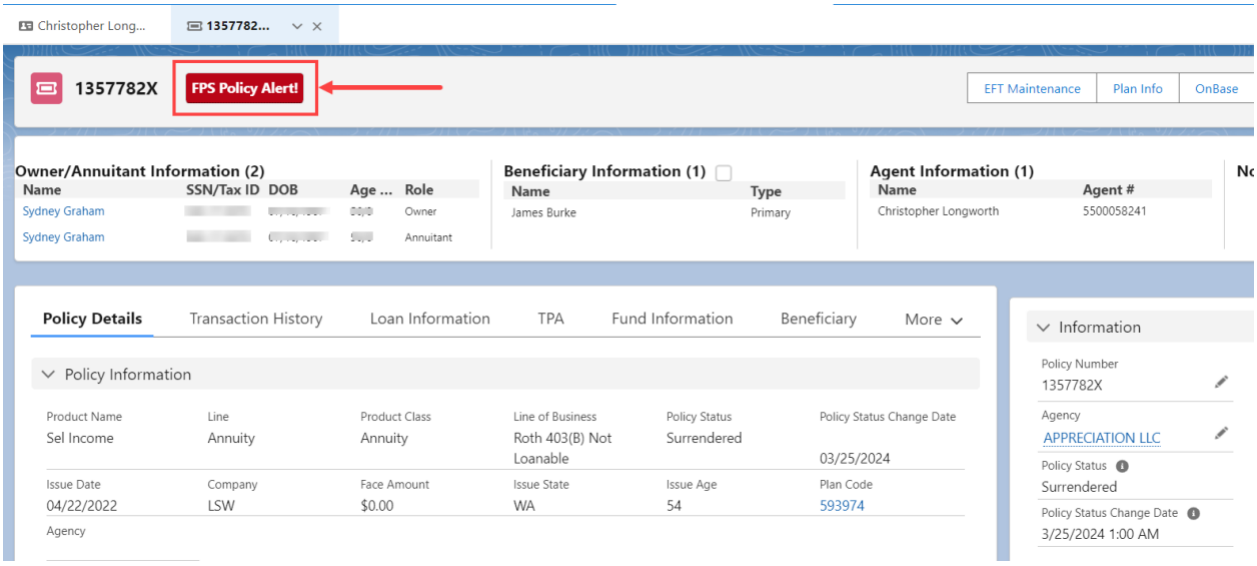
- Phon Y means the policy owner is authorized. Phon N means the policy owner is NOT authorized.
- LPOA Y means the agent is authorized. LPOA N means the agent is NOT authorized.



Overview

Balanced Opportunities is the name of the platform that handles requests for these annuities. The company that owns the Balanced Opportunities platform is called IPX (formerly FPS). Available lines of business include 403(b), 457(b), and IRA.

To identify a Balanced Opportunities policy, look up the policy number in Salesforce.



Authenticating Policy Owners

Proceed with standard authentication practices.

Biometric Authentication Procedures

Caller Authentication Procedures

Viewing Policy Information

Policy Number Format: 1234567X

Policy information can be accessed in all of the standard systems, including Salesforce, Mainframe, and OnBase.

Handling Requests

Most requests should be directed to the Balanced Opportunities platform.

Handled by IPX/FPS	Handled by National Life
Loans	Commission/Compensation
Partial Withdrawals	Allocation Changes
Surrenders	Product-related questions
Beneficiary Change	Interest rate questions
Address Change	
Legal Name Change	
Death Claim Notification	
Separated from service (retired/no longer employed)	

Contact Information:

- Website: www.nationallife.com/balancedopportunities
- Customer Support for Balanced Opportunity Platform call: 877-903-9257
- Customer Support for IPX/FPS: 833-264-1502

Related Resources

- NLG Policy Numbering Scheme for Warm Transfers
- Policy Number Conventions
- Annuity QRC (Blue Card)
- IUL QRC (Green Card)

Article Details

Last Reviewed	3/27/2024	**Intended Audience**	Customer Innovation Group (CIG)
Reviewed by	Evan Kleypas, Kaitlyn Lary, Brandi Solizadair, Juliuse Williams	**Business Block**	After-Issue Operations

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