

Athene Connect Corner

Athene's producer portal, [Athene Connect](#), is your one-stop shop for information and resources to grow and manage your Athene business.

Coming August 1!

Critical RMD data now included in your book of business report

Your standard book of business report will include RMD data for applicable contracts.

NEW Advanced report added to book of business

Find contracts with Required Minimum Distribution with a single click.

NEW Client summary page

Look up clients by name for a consolidated view including contact information, links to active contracts and RMD details.

Not an Athene Connect user? [Sign up today!](#)

For additional information, download our [Athene Connect Guide \(23034\)](#) which includes helpful step-by-step [video tutorials](#).

Suitability review call program

As part of our suitability review process, we may contact certain Athene customers while their applications are being processed. During the call, we'll review key features of the annuity with them and verify they are satisfied with the purchase process.

We've [created a document](#) for you to leave behind with your clients after soliciting an application so that they are aware that Athene may be contacting them and why. You can also find [additional information](#) about this program on Athene Connect.

[Tell me more](#)

Stay alert with Athene's financial crime programs

Our goal is to provide valuable information on an ongoing basis that can help you in your efforts to prevent, detect and combat financial crime. Check out these valuable tips and resources that can help you understand your obligations.

Anti-Fraud

Elder financial abuse is often committed by someone that an elder person knows and trusts. [Learn more](#) about how you are protected as a financial professional if you report suspected elder financial abuse ([training required](#)).

Anti-Money Laundering

As a financial professional, you're responsible for helping identify and deter money laundering activities. [Discover](#) the five acceptable forms of payment for an Athene annuity application.

We're here to help! If you suspect a financial crime, please contact Athene for assistance:

- Call 888-266-8489 or
- Send the [Request for Compliance Review Form](#) to Athene at AMLFraudReferral@Athene.com

Other Legal and Compliance updates

The following information will help you stay current on your responsibilities as an Athene producer. Remember, it is your obligation to know the requirements of your Athene contract, as well as the laws and regulations of any state in which you conduct business.

All states:

[Athene's position on providing investment advice](#) – State insurance and securities regulators continue to be concerned that insurance producers, in all states, are dispensing investment advice without the required securities registration/licensure.

The Montana legislature recently [amended its view](#) to include a key variation from the Suitability in Annuity Transactions Model Regulation ("Model Act") producers may already be familiar with.

To help producers **in all states**, we've put together [guidelines](#) on this topic, including several circumstances under which regulators may conclude that a producer is providing investment advice.

Please make sure you read all updates in their entirety. Failure to comply with applicable regulations may lead to disciplinary action and may be grounds for termination of your appointment and/or contract with Athene.

Thank you for your business. At Athene, we're driven to outperform so your clients can retire confidently. For product and sales support, please contact the best Sales Desk in the business at 888-ANNUITY (266-8489).



The Bottom Line

A monthly digest of important business updates.



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