

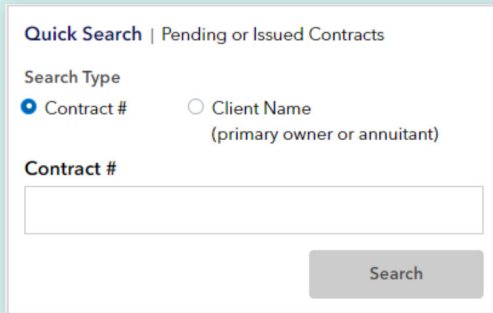
Access client tax documents on Athene Connect

Follow the steps below to access client tax documents on Athene Connect.

1 Log into the Athene Connect website at www.athene.com/producer/login

2 Search for tax documents by contract or client name using one of the following locations:

a. Quick Search Dashboard



Quick Search | Pending or Issued Contracts

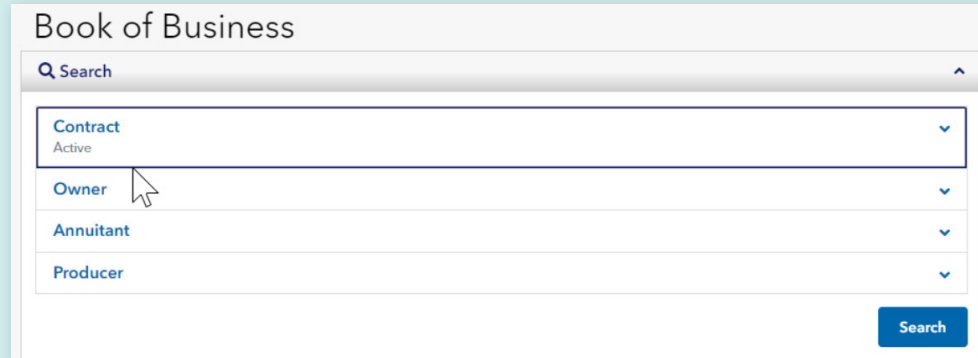
Search Type

Contract # Client Name
(primary owner or annuitant)

Contract #

Search

b. Search section on your Book of Business report



Book of Business

Search

Contract
Active

Owner

Annuitant

Producer

Search

c. Hyperlink from any of the following:

- i. Recent Business Issued report grid
- ii. Production Summary
- iii. Alerts report grid
- iv. Commissions Statements
- v. Downline Commissions
- vi. Any reports selected from the Downline Search page

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Open the Client View page using one of the following methods:

- a. Find the client on a report grid and select the client name.
- b. From the Application Details/Contract Details page, select the client name.

Quick Search

Search for pending or issued contracts by client name (primary owner or annuitant only) or contract number.

Client Name ▾ Colorado

8 results for Colorado

| | Contract # | Owner Name | Annuitant Name | Product | Status |
|-------------------------|---------------|---------------|----------------|--------------------------|---------|
| Preview | 33 [REDACTED] | Colorado, Don | Colorado, Don | Performance Elite Plus 7 | Active |
| Preview | 33 [REDACTED] | Colorado, Don | Colorado, Don | Athene MYG 5 | Pending |
| Preview | 33 [REDACTED] | Colorado, Max | Colorado, Max | Athene Agility 10 | Active |
| Preview | 33 [REDACTED] | Colorado, Max | Colorado, Max | Athene Amplify 2.0 NF | Active |

33 ✓ Active

| | | | |
|-------------------------|-------------------------------------|--------------------------|--------------------------|
| Type Indexed Annuity | Product Performance Elite Plus 7 | Issue Date 12/20/2021 | Tax Qualification IRA |
|-------------------------|-------------------------------------|--------------------------|--------------------------|

Owner(s)

[Colorado, Don](#)

Male
DOB: [REDACTED]
4 [REDACTED] Parkway
[REDACTED], IA 50 [REDACTED]

[View Owner Details](#)

Annuitant(s)

[Don Colorado](#)

Male
DOB: [REDACTED]

[View Annuitant Details](#)

Beneficiary(ies)

Primary
100% - Ben [REDACTED]

- 4 From the Client View page, you will see a Tax Documents section that houses any available Athene tax documents you have access to for that client.

The screenshot shows a client profile for David Adams. The contact information includes an email address (testing@[redacted].com), a phone number (515-111-[redacted]), and a mailing address (7 [redacted] it, Olympia, WA 98 [redacted]). Below the contact info is a section titled 'Tax Documents' with the text 'Tax documents are only available for the primary contract owner.'

Note: You will only be able to see client tax documents for contracts you are actively servicing.

- 5 To access the tax documents, you must complete a Multi-Factor Authentication (MFA) by selecting the 'Get Tax Documents' button and following the MFA steps.

The screenshot shows the 'Tax Documents' section with the text 'Tax documents are only available for the primary contract owner.' and a button labeled 'Get Tax Documents'.

Note: The MFA only needs to be completed once per login session.

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Once the MFA has been successfully completed, you can download any available tax document. The client's mail preference will also be listed on this page.

Tax Documents

Tax documents are only available for the primary contract owner.

Client's Current Delivery Preference: Mail

Tax documents for the most recent year are required to be mailed by January 31st. Documents will display online as soon as they are available.

Tax Year
2022

| Type | Tax State | Contract # | |
|--------|-----------|--------------|--------------------------|
| 5498 | Iowa | 33[REDACTED] | Download |
| 1099-R | Iowa | 33[REDACTED] | Download |

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