



# OCI Annuity Sales Process

## 1. Illustration

- ▶ Sign up with OCI
- ▶ Make sure agent has state required 4-hour annuity training
- ▶ Product training
- ▶ Suitability

## 2. Client wants to move forward (required before taking an application)

- ▶ Get contracted with carrier
- ▶ Make sure product training is completed

## 3. Product training

- ▶ AIG: [https://estationsecure.americangeneral.com/SharedFilePile/AG/95185\\_AGL\\_A3305\\_QUEST\\_CE\\_1\\_.pdf](https://estationsecure.americangeneral.com/SharedFilePile/AG/95185_AGL_A3305_QUEST_CE_1_.pdf)
- ▶ F&G: <https://training.fglife.com/>
- ▶ Lincoln: <https://naic.pinpointglobal.com/LincolnFinancial/Apps/default.aspx>
- ▶ American Equity: <https://agent.american-equity.com/StateProductTraining.asp>
- ▶ Great American: <https://naic.pinpointglobal.com/GAFRISuitability/Apps/Default.aspx>
- ▶ Principal: <https://naic.pinpointglobal.com/Principal/Apps/Default.aspx?ReturnUrl=%2fPrincipal%2fApps%2f>
- ▶ Other: Contact DC for those links

## 4. Case Management

- ▶ Once application is submitted, your point of contact for case management is:
  - Email: [Lifesales@ociservices.com](mailto:Lifesales@ociservices.com)
  - Phone Number: (402) 330-8700
  - AGB Portal (24 hour access to see case status):  
<https://www.ociservices.com/?p=12309>