

What Financial Professionals Need to Know about Pacific Life's New Business Status Tracker

Pacific Life is extremely excited to enhance your experience tracking your annuity business via the new business status tracker. This will vastly enhance your ability to do business with us by providing transparency throughout the application and funding process.

Key Features include

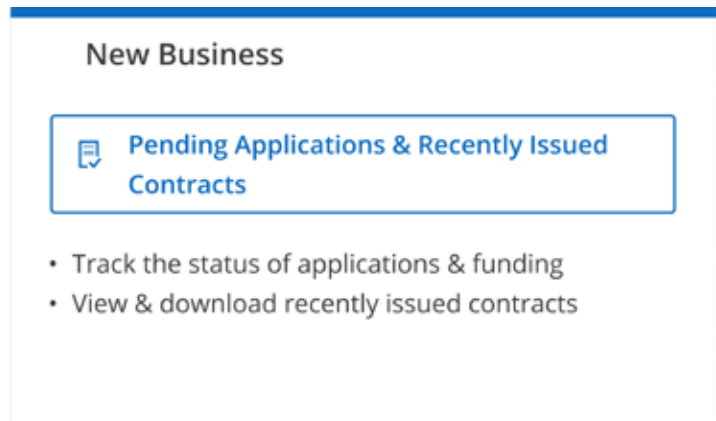
- Ability to view your list of new business applications all in one place
- View detailed status of your applications from submission through contract issue
- Real-time updates related to sources of funding
- View good order status for application and transfer paperwork
- View any not in good order issues and steps to resolve them
- Ability to see when funding has been received by Pacific Life
- Receive duplicate copy of contract electronically upon contract issue

Additional status updates for New York annuity business

- Enhanced identification of applications with New York transfer business (Reg 60)
- Simplified, detailed, real-time status updates on both one-step and two-step Reg 60 processes


Accessing the New Business Status Tracker

You can access the “**Pending Applications & Recently Issued Contracts**” button from the [Pacific Life Annuities Dashboard](#).



Pending Applications Tab

After clicking the button from the dashboard, you will see a list of all your ongoing applications. From here, you can view the status of pending applications.

PACIFIC LIFE

[Pending Applications](#)

[Recently Issued Contracts](#)

[My Dashboard](#)

Welcome Mary!

Below is a list of applications currently in progress. Once a contract becomes issued, it will move to the recently issued contracts tab.

Pending Applications

[Document Upload](#) [Search](#)

Application Status	Contract #	Owner	Last Updated	Plan Type	Product	
Awaiting Funds <small>0000 0000 0000 0000 0000 0000</small>	VM24124353	Basil, Felix	May 31 2024	IRA	Pacific Choice 2	Status
Awaiting Funds <small>0000 0000 0000 0000 0000 0000</small>	FA24124576	Rosemary, Clara	May 30 2024	Non-Qual Individually...	Pacific Expedition 2	Status
Awaiting Funds <small>0000 0000 0000 0000 0000 0000</small>	VM24454359	Cardamom, Leo	May 30 2024	IRA	Pacific Choice 2	Status
Awaiting Funds <small>0000 0000 0000 0000 0000 0000</small>	VM24454351	Clove, Isabelle	May 30 2024	IRA	Pacific Choice 2	Status

Recently Issued Contracts

Clicking on the “Recently Issued Contracts” tab at the top of the page will take you to a list of your contracts that have been issued in the last 90 days. You can access duplicate contracts electronically and view the progress of any recent business, such as information about additional funds that are expected to be received. After 90 days, contracts can be found in your contract management list.

The original contract will still be mailed according to your broker/dealer’s selling agreement with Pacific Life.

The Status Tracker allows you to follow up on the status of applications in real time without having to call Customer Service. By clicking “Status” from any application or recently issued contract, you can view the progress of the application from submission all the way through contract issuance.

Transfers and Activity Tab: Transfer updates and resolved outstanding requirements will surface here.

Rate Lock

The Rate Lock Date and Rate Lock Calculation Method will display for Fixed and Fixed Index annuities. Next to “Rate Lock” a tool tip will display, which will provide easily accessible links to viewing the current rates and helpful fixed annuity resources.

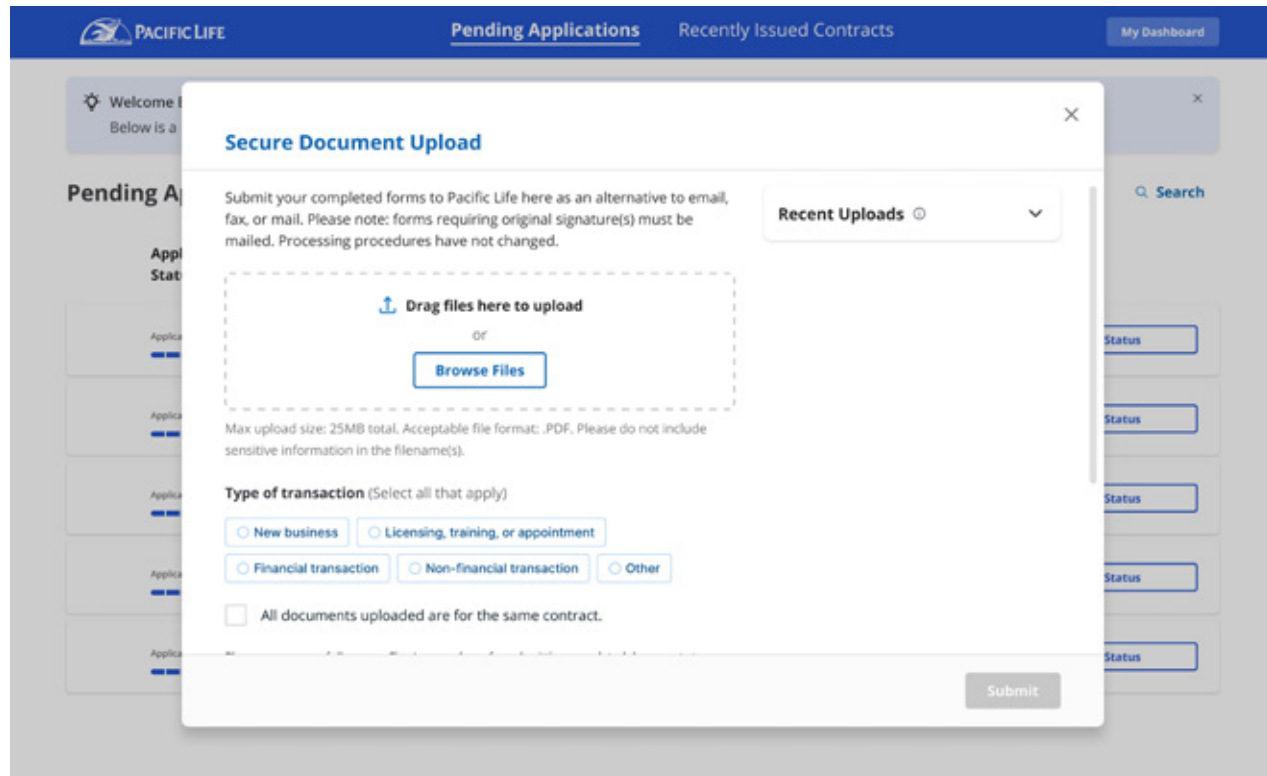
For financial professional use only. Not for use with the public.

Document Upload

Upload documents securely online as an alternative to email or fax. Financial Professionals and their assistants can upload applications, forms, and more.

PDF documents, up to 25MB total, can be uploaded either by dragging and dropping into the box or clicking “Browse Files.” The type of transaction is required to be selected from the list to assist in processing the document easier.


Once all steps are completed, the user will click “Submit” and they will be directed to a printable confirmation screen.



Secure Document Upload

Submit your completed forms to Pacific Life here as an alternative to email, fax, or mail. Please note: forms requiring original signature(s) must be mailed. Processing procedures have not changed.

Recent Uploads ⌵

 **Drag files here to upload**

or

Browse Files

Max upload size: 25MB total. Acceptable file format: .PDF. Please do not include sensitive information in the filename(s).

Type of transaction (Select all that apply)

☐ New business ☐ Licensing, training, or appointment

☐ Financial transaction ☐ Non-financial transaction ☐ Other

☐ All documents uploaded are for the same contract.

Submit

Need Help?

While we are confident that our status tracker can provide you a more efficient way to manage your annuities new business applications, we are continually working to improve the experience that it offers to our financial professionals. We value the feedback of our users to help us understand what we are doing well, and where we have opportunities for improvement. If you need additional assistance, please contact Customer Service.

Award-winning Pacific Life Customer Service

We at Pacific Life take great pride in our industry-leading and award-winning service, the support from professionals, and knowledgeable annuity information specialists. We are humbly honored to have received multiple DALBAR Service Awards since 1997.

Contact our award-winning Pacific Life Customer Service team.

(800) 722-2333, or (800) 748-6907 for New York, M–F, 6:00 A.M.–5:00 P.M. PT

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