



# Quick Start Guide

Thank you for your interest in offering a fee-based annuity. The steps below can help walk you through the process.



## 1. Getting started

### Get registered with Great American Life®

To begin the registration process, please visit [GreatAmericanRIA.com](http://GreatAmericanRIA.com) and select *Get Started* in the upper right-hand corner.

- » Choose *Investment Advisory Representative* to register as an IAR.
- » Choose *Registered Investment Advisory Firm* to register your RIA.

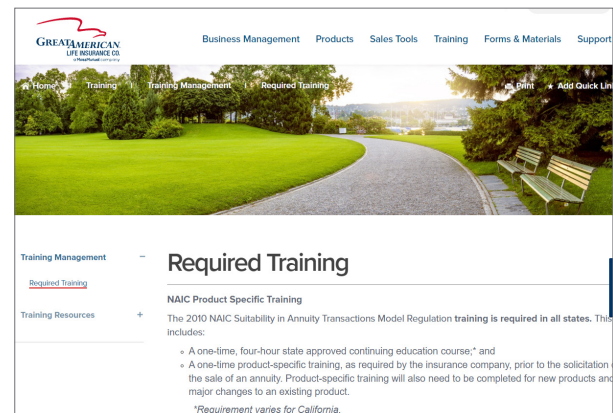
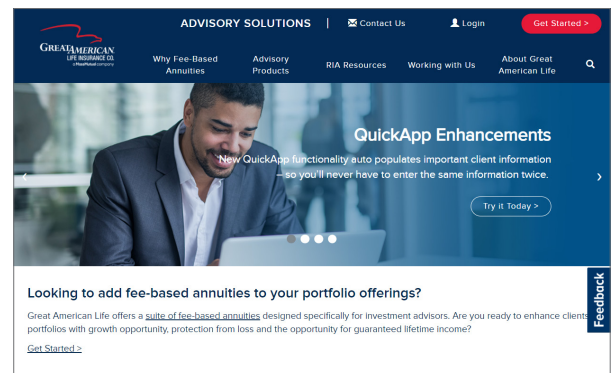
Please note you must be appointed and insurance licensed in order to offer a fee-based annuity.

### Complete required training

Training is required prior to the sale of a fee-based annuity. Once you are appointed, please log into [GreatAmericanRIA.com](http://GreatAmericanRIA.com) and click *Training* at the top of the page to complete all required training. Note that fee-based annuity applications will not be accepted if required training has not been completed.

### Review documentation

Check your RIA's Form ADV to verify if it permits the offering of annuity products.



Between our advanced integration capabilities and unparalleled service, Great American Life offers a seamless experience every step of the way.





## 2. Submitting New Business

### Complete the application

Great American Life accepts both paper and electronic new business applications. Please log into [GreatAmericanRIA.com](http://GreatAmericanRIA.com) to obtain a paper application or submit business using QuickApp<sup>SM</sup>, our electronic application system designed specifically for RIAs. QuickApp provides real-time alerts to help reduce the chance of errors. Plus, it integrates with your CRM to auto populate important client details.

In addition, participating firms may submit electronic applications through the following platforms:

- » Affirm by Aplifi
- » AnnuityNet by Ebix
- » Firelight by Insurance Technologies

### Submitting funds to Great American Life

Fee-based annuity funds can be submitted using the methods below.

- » Money settlement from approved Broker/Dealers
- » Check payable to Great American Life Insurance Company
- » Wire

### Other important information

When completing the sale, you may need the CUSIPs:

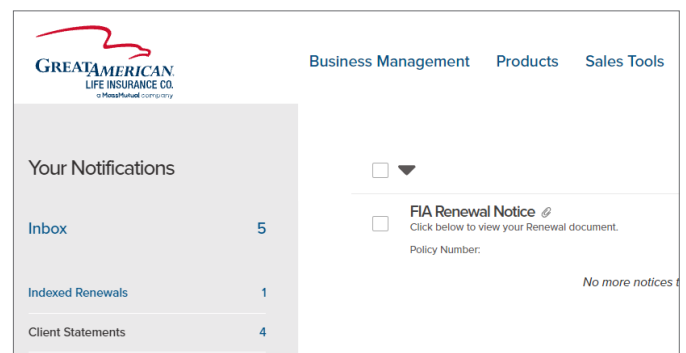
	Index Protector 7 (MVA)	Index Protector 7 (Non-MVA)	Index Protector 5 MVA	Index Protector 4	Advantage 5 Advisory (coming soon)
CUSIP	38983T438	38983T446	38983V144	38983v136	38983v268
ISIN Number	US38983T4388	US38983T4461	US38983V1448	US38983V1364	US38983V2685



## 3. Managing within a portfolio

### Client correspondence

- » After a contract is issued, the application and contract will be mailed to you or your client, based on your election at the time of appointment. You can also elect to have contracts delivered online through e-delivery.
- » Both you and your client will receive an annual statement. In addition, your client will receive abbreviated quarterly statements showing the contract values at the end of the period and all transactions during the period.
- » Your client can change their indexed strategy allocations at the end of each term. Thirty days prior to the end of the term, your client will receive a form that can be used to request changes. You can also make allocation changes online on a client's behalf.



### Fee-based billing

To withdraw fee payments from an Index Protector fixed-indexed annuity, please complete the Investment Advisory Fee Request form. Fee payments will not begin until after the free-look period, will not affect income rider benefits and are not subject to early withdrawal charges or MVAs.

### Data integration

Simplify your business needs with data integration. We're pleased to support the following solutions:



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Not FDIC or NCUSIF Insured	No Bank or Credit Union Guarantee	May Lose Value	Not Insured by any Federal Government Agency	Not a Deposit
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