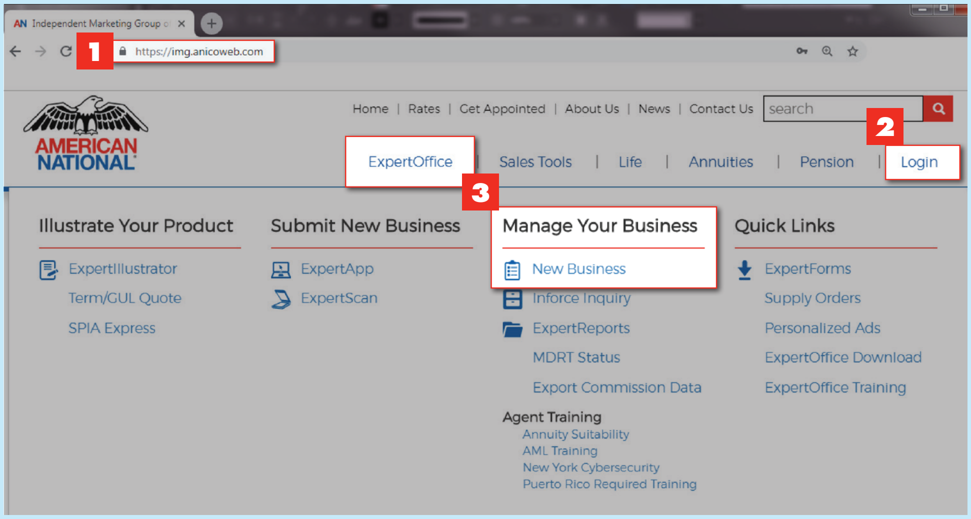
ExpertOffice Tool: New Business

Have you experienced all the ways your|New Business allows you to manage new and pending life and annuity business? Features include:

- Easy navigation, built directly into the IMG website.
- An interactive dashboard containing search and sort capabilities.
- Uploading directly to ExpertScan without leaving the New Business tool.
- The ability to export the policy list into Excel.
- Availability of new business documents for each policy at the touch of a button.

Finding New Business

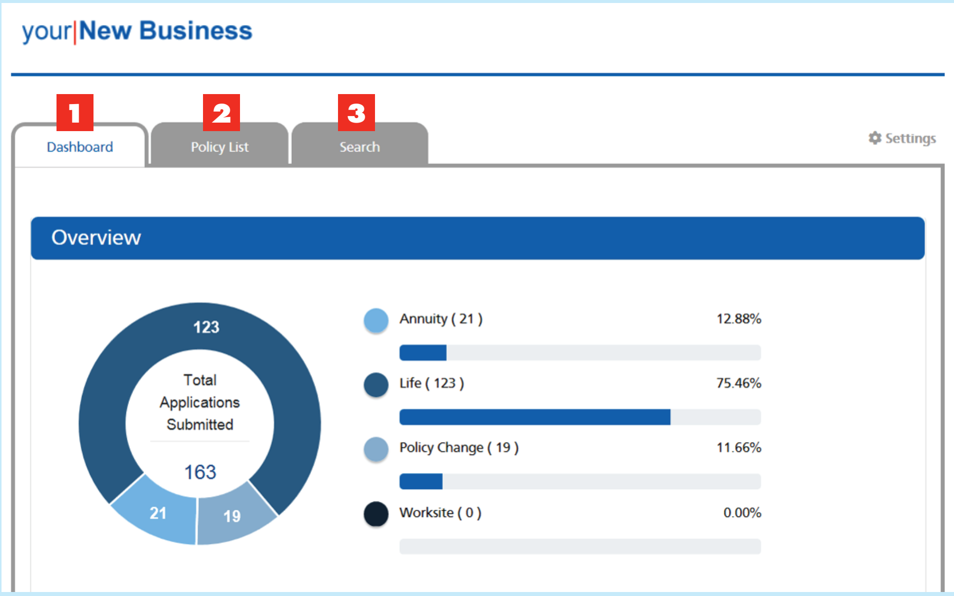
1. Visit img.anicoweb.com
2. Login to ExpertOffice
   If you do not know your ExpertOffice login, contact 888-501-4043
3. Navigate to: ExpertOffice > Manage Your Business > New Business



When you've reached the New Business tool, you'll see a screen like the one on the right. The New Business tool includes the following tabs:

1. **Dashboard**
   Provides an overview of all pending business.
2. **Policy List**
   Lists policy numbers and client names.
3. **Search**
   Gives you the ability to locate new business by hierarchy, policy number, producer code, or client name.

The tab that your screen will open to is dependent on your settings. By default, the page will open to the Dashboard tab.



Dashboard tab

The dashboard provides an overall view of applications submitted as well as a more detailed breakdown by line of business. Clicking on information on the dashboard will take you to additional information about that line of business and/or policies.

Dashboard Sections

1 Overview

This section gives a quick view of your lines of business.

2 Life Business

This section will appear if you have submitted life applications. The graphic at the top of the section shows how many applications are Critical, In Progress, or Complete.

- **Critical** = applications that have been inactive for at least 30 days and are at risk of becoming incomplete.
- **In Progress** = applications moving through the review process. If you click on In Progress, you will see a status chart that indicates progression steps of the workflow system.
- **Complete** = final actions made on an application which is used to separate the active business.

A more detailed view of new business is available on the three status progression bars that reveal exactly where an application is in the new business process.

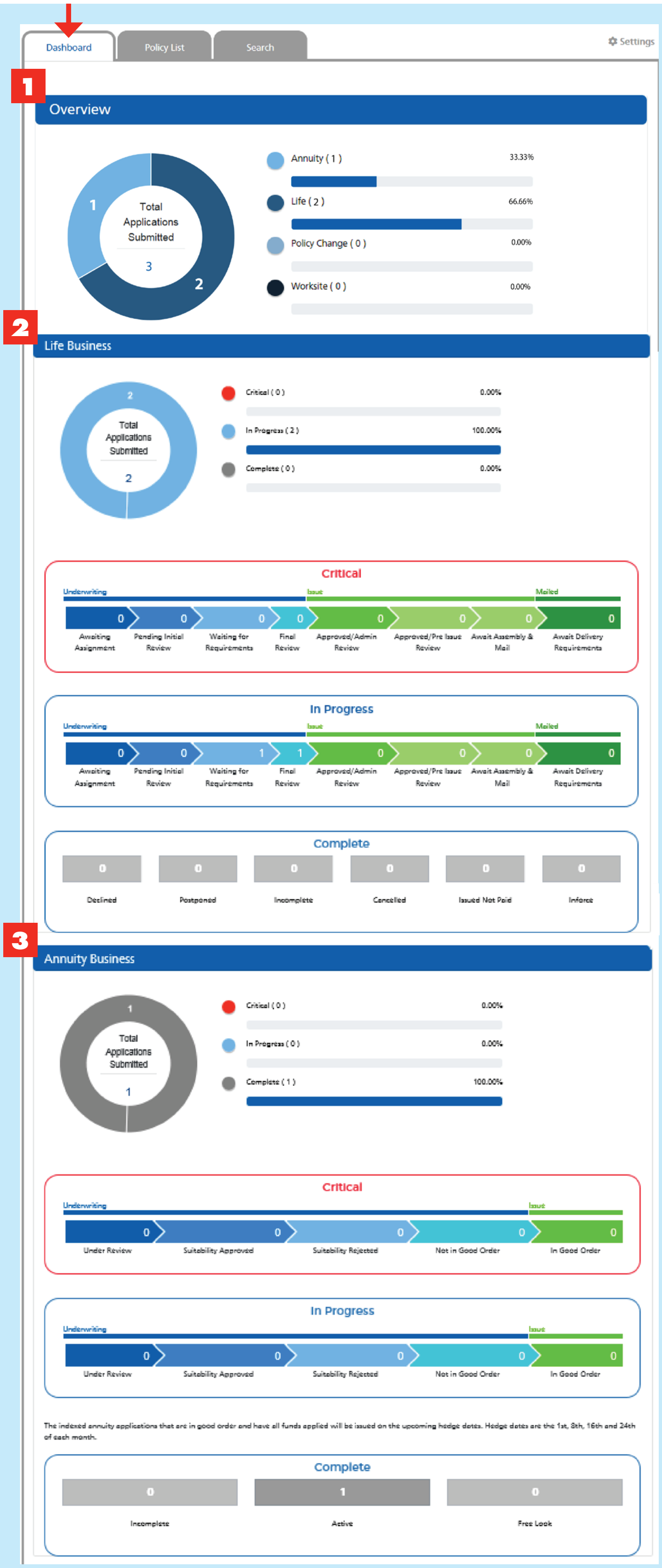
Clicking on any part of the graphics in this section will take you to a list of applications in that stage.

3 Annuity Business

This section will appear if you have submitted annuity applications. The annuity section also shows how many applications are in Critical, In Progress, or Complete but the status progression bars are split into stages appropriate for annuity business.

Clicking on any part of the graphics in this section will take you to a list of applications in that stage.

Please take special notice of the **Suitability Approved** and **Suitability Rejected** stages. Applications that are approved or rejected during suitability review are indicated here.



For Agent Use Only; Not For Distribution or Use With Consumers.

AMERICAN NATIONAL

Policy List tab

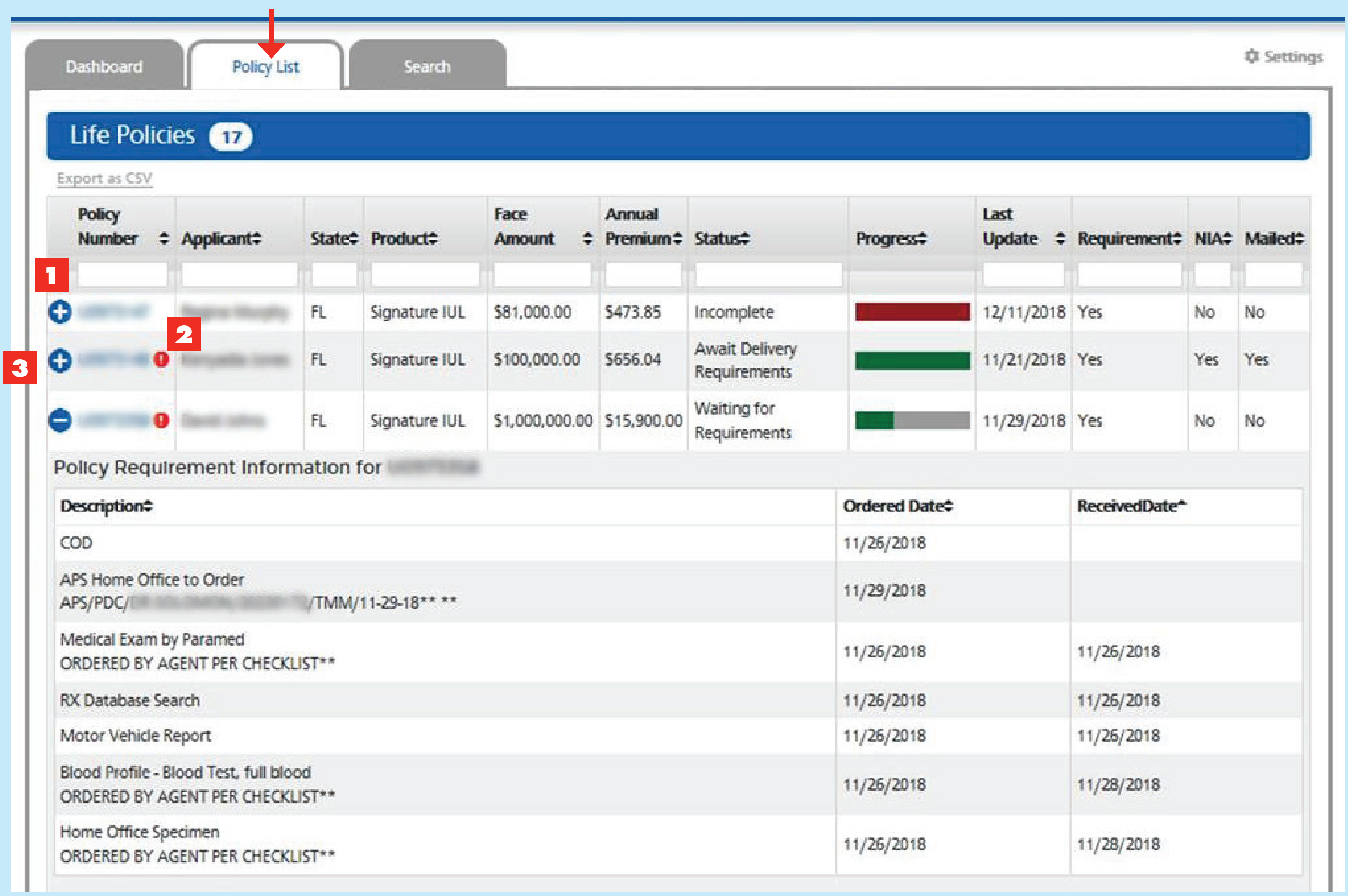
The policy list provides an overall view of applications submitted as well as a more detailed breakdown by line of business. Clicking on the policy number in the Policy List will take you to additional information about that policy.

All personal information included in the image below has been blurred for privacy reasons.

1 **Filtering**
The fields below the column names serve as search fields that allow you to filter through the policies in your list.

2 **Critical Policies**
A ! next to the policy number means that the case has been inactive for at least 30 days and is at risk of becoming incomplete.

3 **Policy Requirements**
Clicking on the + will allow you to view the policy requirements without leaving the page. Clicking the - will minimize the requirements.



Policy Number	Applicant	State	Product	Face Amount	Annual Premium	Status	Progress	Last Update	Requirement	NIA	Mailed
		FL	Signature IUL	$81,000.00	$473.85	Incomplete		12/11/2018	Yes	No	No
		FL	Signature IUL	$100,000.00	$656.04	Await Delivery Requirements		11/21/2018	Yes	Yes	Yes
		FL	Signature IUL	$1,000,000.00	$15,900.00	Waiting for Requirements		11/29/2018	Yes	No	No

Policy Requirement Information for

Description	Ordered Date	ReceivedDate
COD	11/26/2018	
APS Home Office to Order APS/PDC/ /TMM/11-29-18** **	11/29/2018	
Medical Exam by Paramed ORDERED BY AGENT PER CHECKLIST**	11/26/2018	11/26/2018
RX Database Search	11/26/2018	11/26/2018
Motor Vehicle Report	11/26/2018	11/26/2018
Blood Profile - Blood Test, full blood ORDERED BY AGENT PER CHECKLIST**	11/26/2018	11/28/2018
Home Office Specimen ORDERED BY AGENT PER CHECKLIST**	11/26/2018	11/28/2018

ExpertOffice Tool: New Business

Policy Detail Information

Use the tabs at the top of the screen to toggle between policies that are already opened.

An overview will be displayed for each policy that is opened

Policy Detail Sections

By default, the following sections will be minimized. Clicking on each of the blue banners will open/close the section.

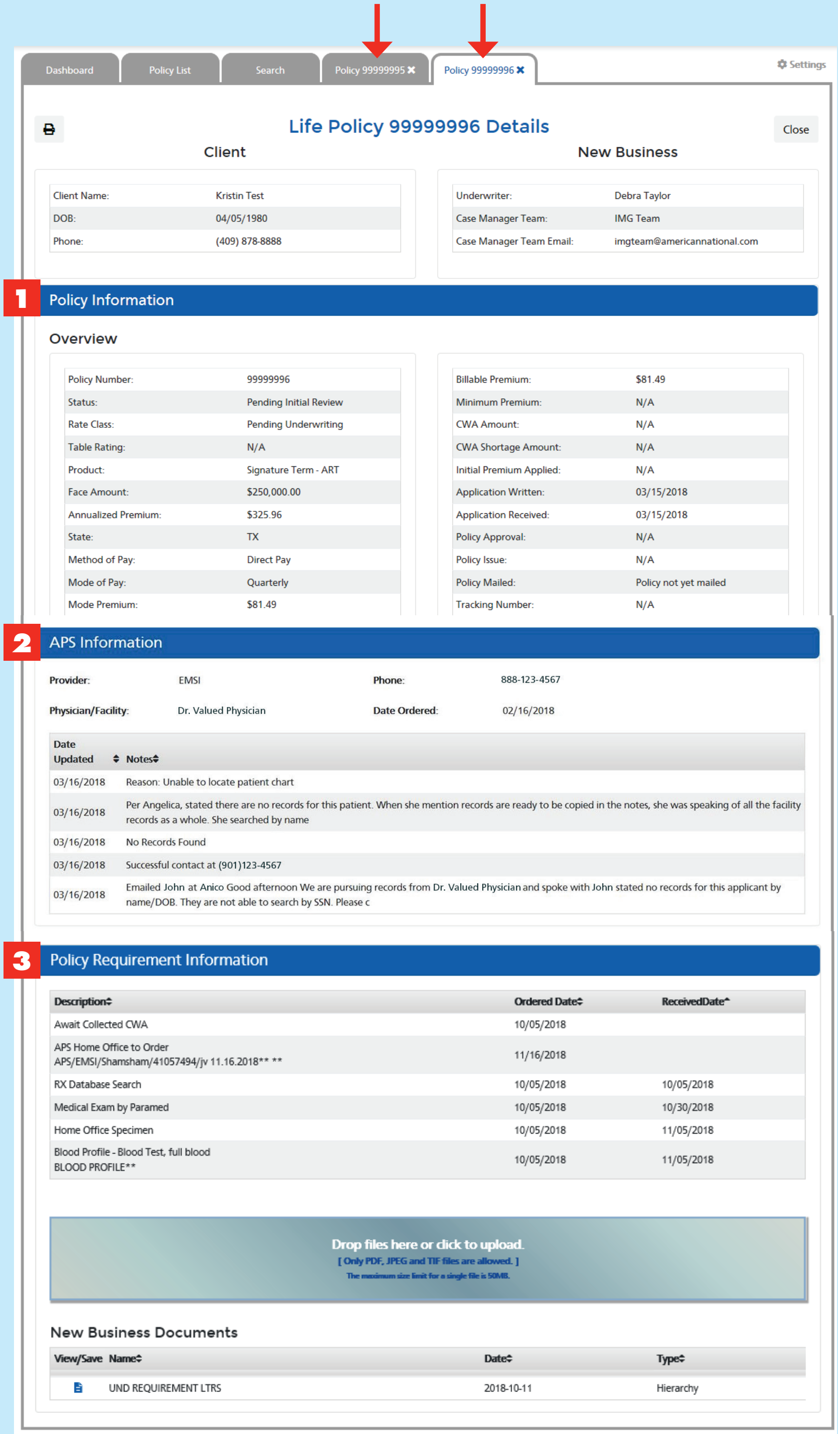
1 Policy Information
An overview of the policy including, but not limited to, the Status, Policy Rating and whether the policy was issued and/or mailed.

2 APS Information
This section provides detailed notes from the APS vendors, EMSI, or PDC along with the last date updated.

3 Policy Requirement Information
This section includes a description of requirements ordered and/or received.

It also includes an easy to use "drag and drop" field that allows you to upload pending requirement information directly from the policy details via ExpertScan.

At the bottom of this section, you'll see a list of new business documents. From here you can view, print, or save policy correspondence (such as the NIA).



Search tab

When you've reached the Search tab, you'll see a screen like the one on the right, without leaving the IMG website.

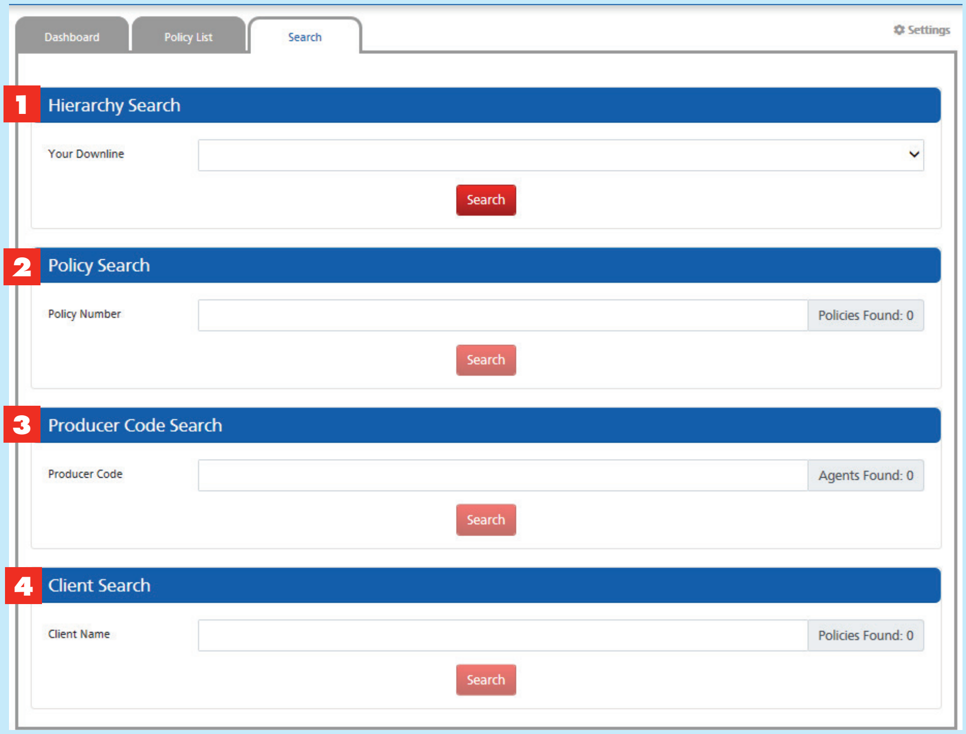
The Search tab includes the following sections:

1. **Hierarchy Search**
Available for agencies. Allows you to choose a downline in the dropdown

2. **Policy Search**
Available for agents and agencies. Allows you to search by the policy number.

3. **Producer Code Search**
Available for agencies. Allows you to find a downline by their Producer Code Number (PCN)

4. **Client Search**
Available for agents and agencies. Allows you to find policy(ies) by searching for a client's name.



For more information, contact the Marketing Field Support Center at 888-501-4043

American National Insurance Company, headquartered in Galveston, Texas is licensed to conduct business in all states except New York. Business is conducted in New York by American National Life Insurance Company of New York, headquartered in Glenmont, New York. Each company has financial responsibility for only the products and services it issues.

For Agent Use Only; Not For Distribution or Use With Consumers.