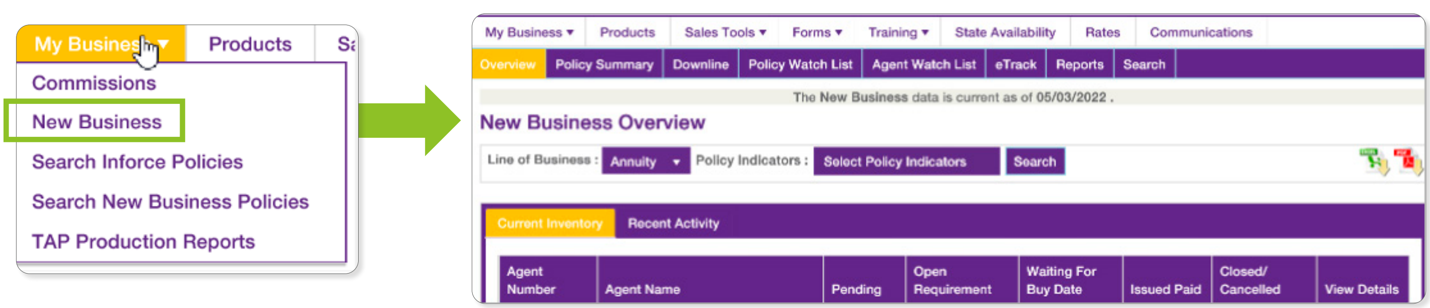
All About Accessing New Business in SalesLink®

Our agent and advisor portal, **SalesLink**, is your best resource for doing business with us quickly and easily. This guide will help you navigate your new business.

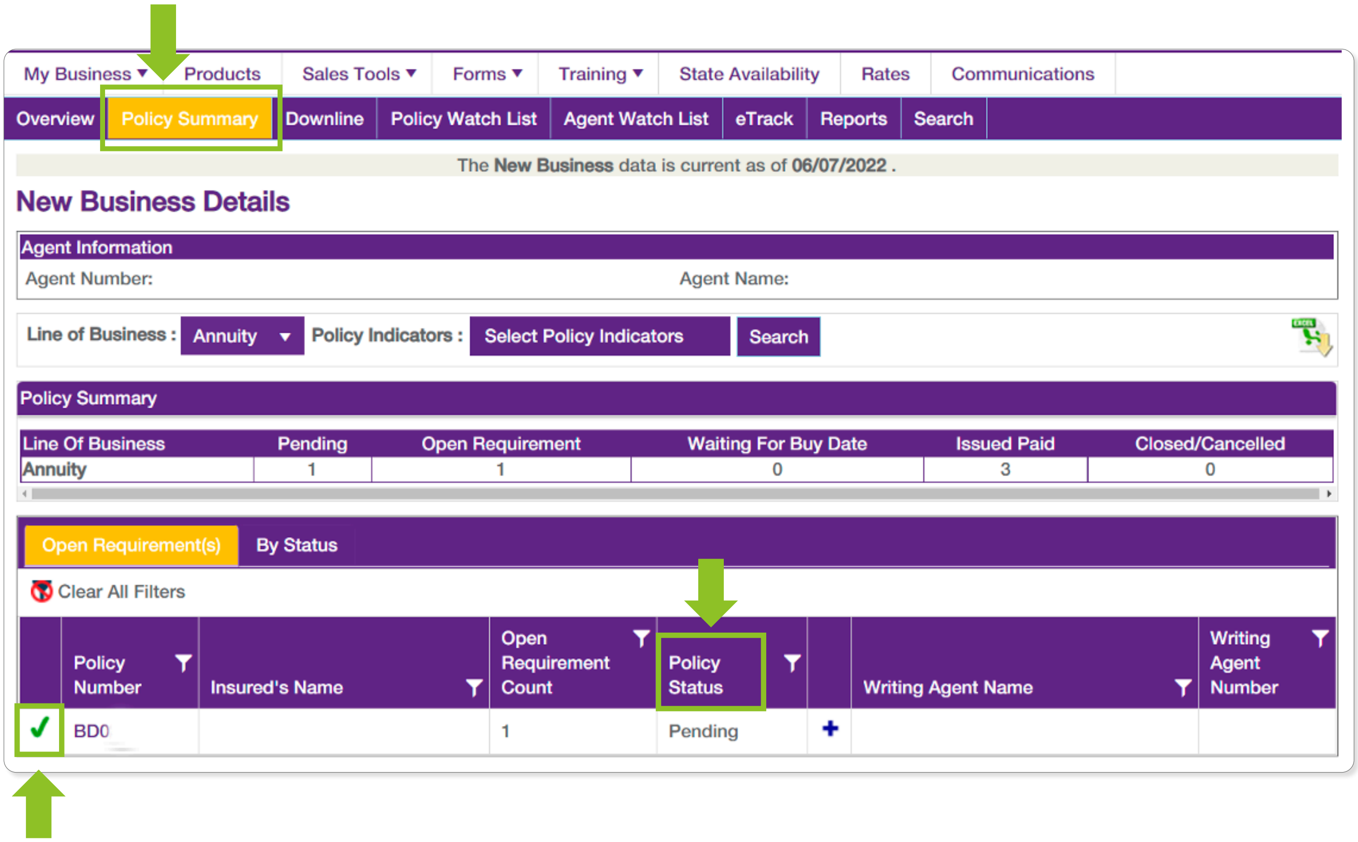
How to access new business:

Log into SalesLink. Once logged in, hover over the tab titled **My Business**, then select **New Business** to get to your **New Business Overview** page.



ADV5506 (10-2024)
24-1286

From this screen, select the second tab, **Policy Summary**, to view all pending/issued paid/canceled business.



To view your pending business, click **Policy Status**. From there, select the **Policy Number** to see policy-specific information, including requirements, notes, 1035 transfers, contract details and the policy hierarchy.

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Fidelity & Guaranty Life Insurance Company

ADV5506 (10-2024)
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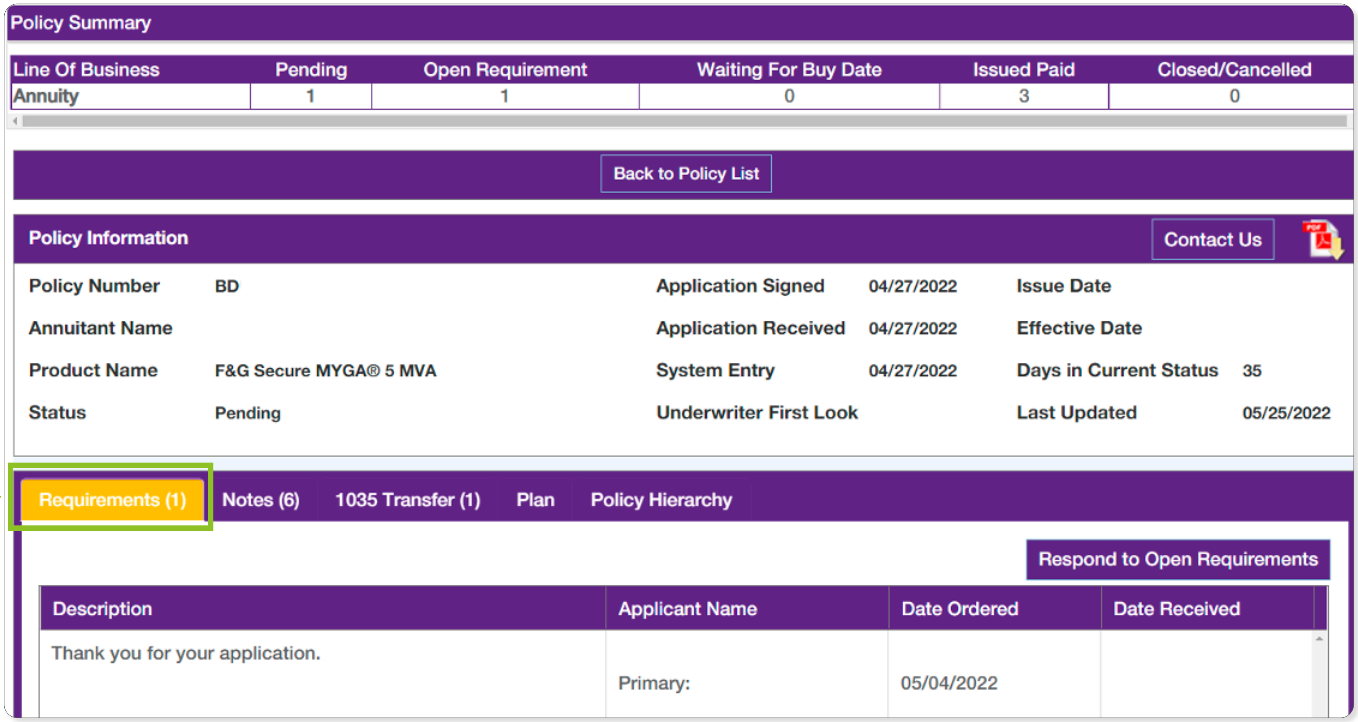
Any requirements listed will be found here under the **Requirements** tab.



Policy Summary

Line Of Business	Pending	Open Requirement	Waiting For Buy Date	Issued Paid	Closed/Cancelled
Annuity	1	1	0	3	0

Back to Policy List

Policy Information — Contact Us

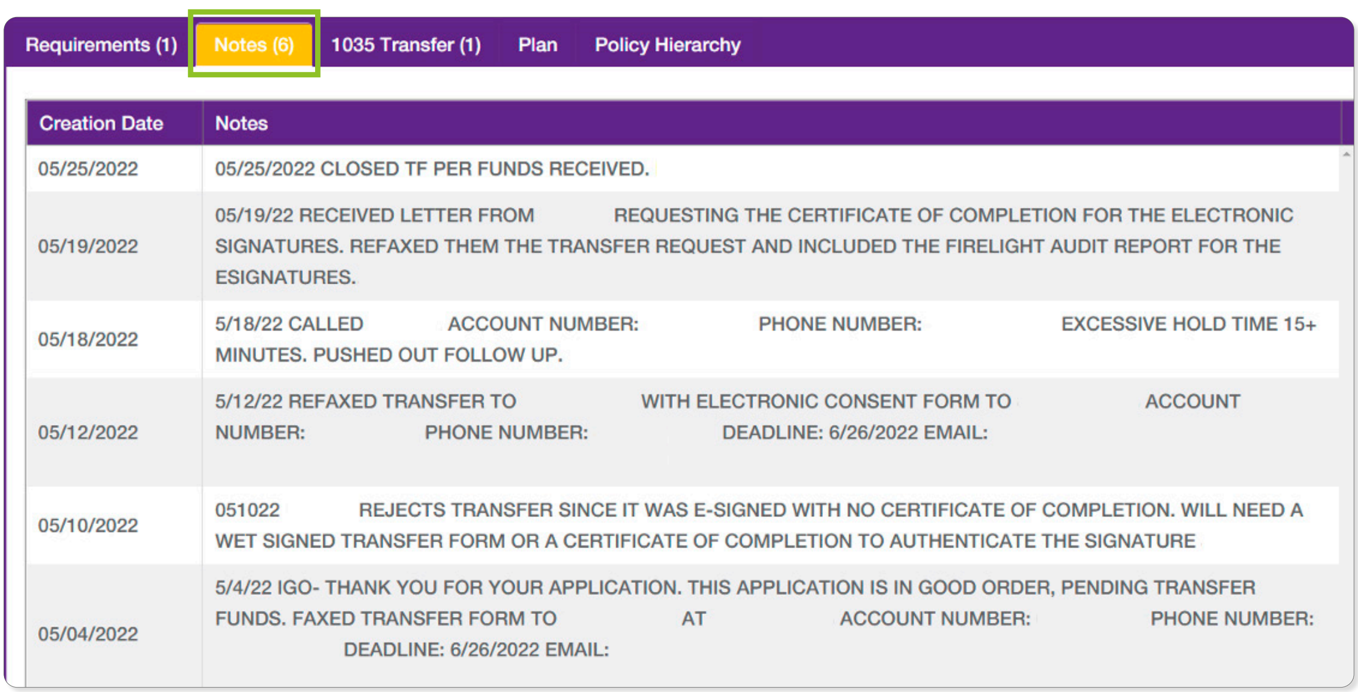
Policy Number	BD	Application Signed	04/27/2022	Issue Date	
Annuitant Name		Application Received	04/27/2022	Effective Date	
Product Name	F&G Secure MYGA® 5 MVA	System Entry	04/27/2022	Days in Current Status	35
Status	Pending	Underwriter First Look		Last Updated	05/25/2022

Requirements (1) | Notes (6) | 1035 Transfer (1) | Plan | Policy Hierarchy

Respond to Open Requirements

Description	Applicant Name	Date Ordered	Date Received
Thank you for your application.	Primary:	05/04/2022	

The next tab, **Notes**, will show all notes that have been made on the policy.



Requirements (1) | Notes (6) | 1035 Transfer (1) | Plan | Policy Hierarchy

Creation Date	Notes
05/25/2022	05/25/2022 CLOSED TF PER FUNDS RECEIVED.
05/19/2022	05/19/22 RECEIVED LETTER FROM REQUESTING THE CERTIFICATE OF COMPLETION FOR THE ELECTRONIC SIGNATURES. REFAXED THEM THE TRANSFER REQUEST AND INCLUDED THE FIRELIGHT AUDIT REPORT FOR THE ESIGNATURES.
05/18/2022	5/18/22 CALLED ACCOUNT NUMBER: PHONE NUMBER: EXCESSIVE HOLD TIME 15+ MINUTES. PUSHED OUT FOLLOW UP.
05/12/2022	5/12/22 REFAXED TRANSFER TO WITH ELECTRONIC CONSENT FORM TO ACCOUNT NUMBER: PHONE NUMBER: DEADLINE: 6/26/2022 EMAIL:
05/10/2022	051022 REJECTS TRANSFER SINCE IT WAS E-SIGNED WITH NO CERTIFICATE OF COMPLETION. WILL NEED A WET SIGNED TRANSFER FORM OR A CERTIFICATE OF COMPLETION TO AUTHENTICATE THE SIGNATURE
05/04/2022	5/4/22 IGO- THANK YOU FOR YOUR APPLICATION. THIS APPLICATION IS IN GOOD ORDER, PENDING TRANSFER FUNDS. FAXED TRANSFER FORM TO AT ACCOUNT NUMBER: PHONE NUMBER: DEADLINE: 6/26/2022 EMAIL:

The **1035 Transfer** tab will show the transfers we have on file. If you have submitted more than one transfer, you will see them all listed here.

Requirements (1) | Notes (6) | **1035 Transfer (1)** | Plan | Policy Hierarchy

Company Name	Contract Number	Anticipated Amount	Received Amount
		$25,600.00	$45,248.69

The **Plan** tab will give you contract details.

Requirements (1) | Notes (6) | 1035 Transfer (1) | **Plan** | Policy Hierarchy

CWA Received	$70,886.66	**Gender**	Male
Face Amount	$0.00	**Birth Date**	
Annual Premium	$25,600.00	**Issue State**	MA
Target Premium	$0.00	**Underwriting Class**	

The final tab, **Policy Hierarchy**, will show you the agent name, level, and any splits on the application.

Requirements (1) | Notes (6) | 1035 Transfer (1) | Plan | **Policy Hierarchy**

Agent Name	Agent Number	Hierarchy Level	Split Percentage
		1	100

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