

Online Self-Service Capabilities

for our annuity and life insurance owners

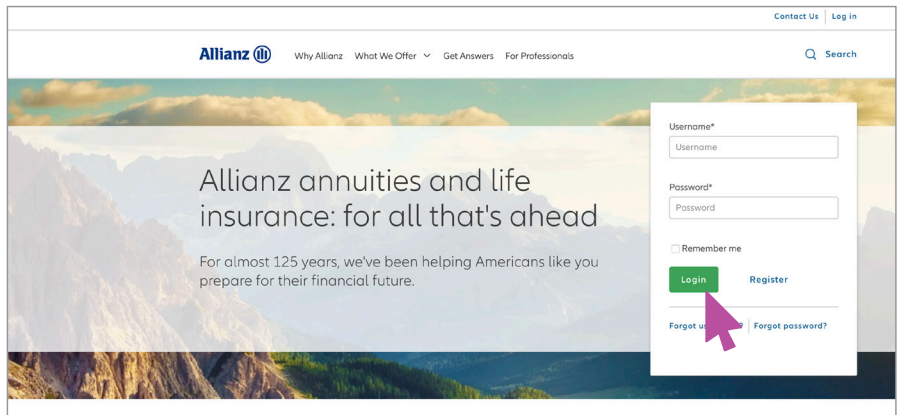
Thank you for purchasing an Allianz life insurance or fixed index annuity product. As an accountholder, you can manage many account tasks online, 24 hours a day, 7 days a week. www.allianzlife.com or www.allianzlife.com/new-york (For New York accountholders)

TO CREATE AN ACCOUNT:

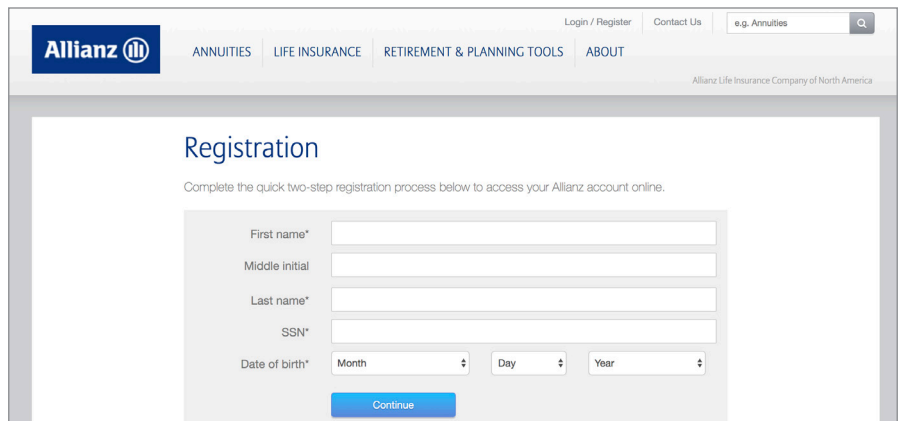
- Go to www.allianzlife.com (or www.allianzlife.com/new-york).
- Click Log In/Register at the top of the page or in the Login pane. (figure 1)
- Select the Register button.
- Complete the quick two-step registration process to access your Allianz account online. (figure 2)

Note: All personal information submitted will be kept in the strictest security.

(figure 1)



(figure 2)



After you log in to your account, you can see your current policy values and perform these account-related tasks:

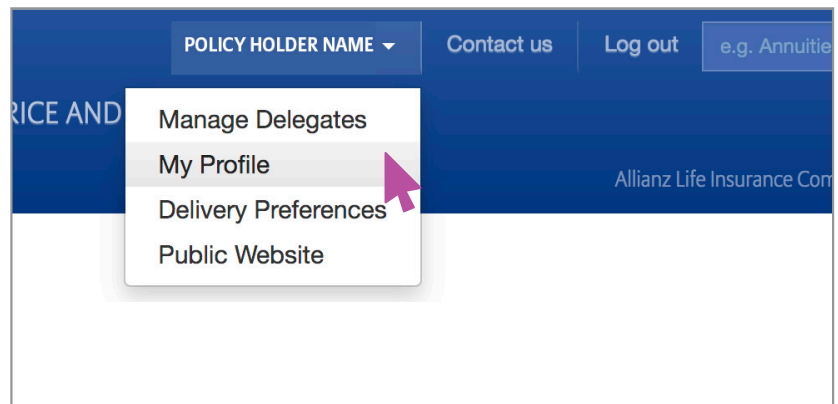
ACCESS ACCOUNT STATEMENTS

- You can view current account statements and correspondence (including tax documents and contract/policy statements).
- Fixed index annuity policyowners also have the option to view archived statements.

Date	Product Name	Policy #	Letter Name	Description	Correspondence Type
10/02/2017	Life Pro Plus		Valid POA variations	Form 5498 information	Inforce
07/27/2017	Allianz 360 Annuity		ACR Unable to Comply to PO-not CCSP Compliant	General Correspondence	Inforce
02/27/2017	Life Pro Plus		IRC7702 Base and Variation.DOC	Policy Changes	Inforce

TO CHANGE OR EDIT YOUR ONLINE ACCOUNT PROFILE OR DELIVERY PREFERENCES

- After you've logged in, click on your name in the top bar.
- In the sub-menu of options, scroll down to **My Profile**.
- You will see a series of editable fields for your
 - Name and email
 - User name
 - Password
 - Mobile phone number
- In the sub-menu of options, scroll down to **Delivery Preferences**.
- You will be able to manage how account communications are delivered to you.



CHANGE YOUR ALLOCATIONS

- When making allocation changes, be sure these changes make sense for your goals. Your financial professional can provide you with guidance.

Note: If you'd like your financial professional to be able to change allocations on your behalf, you must first provide authorization. Use the Give Transaction Authorization link (under the tab or in the Agent section) and follow the instructions.

Accounts

Personal Accounts

- Current Statements
- Archived Statements
- Document Upload

Overview & Values

Withdrawal Request History

Change Allocation

Your financial professional does not have transaction authorization to change allocations on your behalf.

- › Give transaction authorization

Change Beneficiary

Submit beneficiary change request form online

WITHDRAW FUNDS

- You can request an online withdrawal if available, or view your withdrawal history. We recommend that you discuss your withdrawal goals with your financial professional before making a request.

Values (as of 2018)

Accumulation Value	\$
Cash Surrender Value	\$
Free Withdrawal Amount Available	\$
Protected Income Value	\$
Total Withdrawals Taken	\$0.00

[Request a Free Withdrawal](#)

CHANGE A BENEFICIARY

- Please note** that each time you make a beneficiary change, you will need to re-enter the information for all beneficiaries.

My Policy

Overview & Values | [Withdrawal Request History](#)

[Change Allocation](#)

Your financial professional does not have transaction authorization to change allocations on your behalf.
[Give transaction authorization](#)

[Change Beneficiary](#)

Submit beneficiary change request form online

REQUEST A REQUIRED MINIMUM DISTRIBUTION (RMD)

- If applicable to your account, you can see current RMD amounts and request an RMD.

Required Minimum Distribution Values (as of 2018)

RMD Eligible	2018
12/31 Fair Market Value	\$
Current calendar year RMD Amount	\$
Remaining calendar year RMD amount	\$
Scheduled RMD	No

[Set up RMD payment schedule](#)

[Required Minimum Distribution \(RMD\) Election Form](#)

CHANGE CONTACT INFORMATION

- You can view current Client and Agent contact information and make any desired changes.

Client				Agent		
Type	Name	Mailing address	Phone number	Name	Phone number	Email address
Owner	LAST NAME, FIRST NAME	ADDRESS LINE 1 ADDRESS LINE 2 ZIP CODE	(XXX) XXX-XXXX	LAST NAME, FIRST NAME	(XXX) XXX-XXXX	EMAIL@ADDRESS.COM
Payer	LAST NAME, FIRST NAME	ADDRESS LINE 1 ADDRESS LINE 2 ZIP CODE	(XXX) XXX-XXXX	Your financial professional does not have transaction authorization to change allocations on your behalf. Give transaction authorization		

Note: Your client contact information is different than your profile information. Changing one will not change the other. Any desired changes must be made separately.

VIEW BILLING INFORMATION

- You can view your billing type, billed premium, and total premium paid, as well as your payment history.

Billing	
Billing Type	Single Premium
Billed Premium	\$0.00
Total Premium Paid	\$XXX,XXX.XX
View My Premium Paid History	

FOR DOWNLOADABLE FORMS

- At the bottom of the page, you'll find forms for tasks like requesting funds, transferring ownership, and providing certain authorizations.

Forms
<ul style="list-style-type: none">› Request Funds from My Annuity› Begin Receiving an Income Stream (See your policy for annuity option provisions)› Change My Contract Information› Request to Transfer Ownership and/or Change Beneficiaries› Telephone Transaction Authorization Form

FOR UPLOADING DOCUMENTS

- Once you've completed the form, use Document Upload (in the Accounts menu on the left) and follow the instructions to easily upload your account requests.

The screenshot shows the Allianz website's Document Upload page. At the top, there's a navigation bar with the Allianz logo and links for ACCOUNTS, DOCUMENT UPLOAD, and PRICE AND PERFORMANCE. Below this, a sidebar menu on the left lists 'Accounts', 'Personal Accounts', and 'Document Upload' (which is highlighted). The main content area is titled 'Document Upload' and includes a 'Document upload' button and a 'View upload history' link. There's a form with a 'Select policy/contract #' dropdown menu and an 'Add note' button. Below the form, a 'Please Note' section lists file type restrictions (tif, pdf, jpg, doc, xls, zip, ppt) and a 30 MB limit. At the bottom, there are 'Add files' and 'Start upload' buttons.



If you can't find what you need online, or have questions, we'll always be available for assistance via our Customer Care Center.