Annuity Order Entry Add Attachments

Reference Sheet

Upon completion of data entry within the annuity order entry tool for fixed or variable annuity orders, the user must render forms, obtain signatures, add attachments, and submit the order. This document provides instructions on adding attachments via the annuity order entry platform.

Note: If using eSignature, refer to the eSignature training materials located in the eSignature section on the Annuity Business Submission FieldNet page.

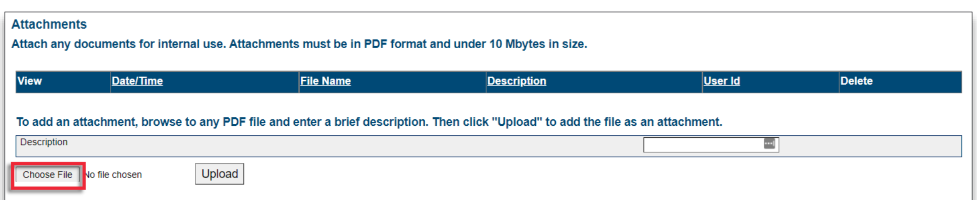
Adding Attachments

Uploading Forms

After rendering forms in the annuity order entry system, from the **Forms Submit tab**, a listing of forms display that the user may view and print in PDF format. Additionally, the user may upload forms that require signature (e.g., system-generated forms, which vary based on the details of the order and/or forms not rendered by the platform such as illustration, power of attorney, recent account statement, side-by-side comparison, etc.). Once forms are signed and dated by the client(s) and advisor(s), upload forms:

Tip: VA-to-VA replacement transactions, using eSignature, require a side-by-side comparison and a copy of a recent account statement.

1. Select **Choose File** in the **Attachments section** on the **Forms Submit tab**.



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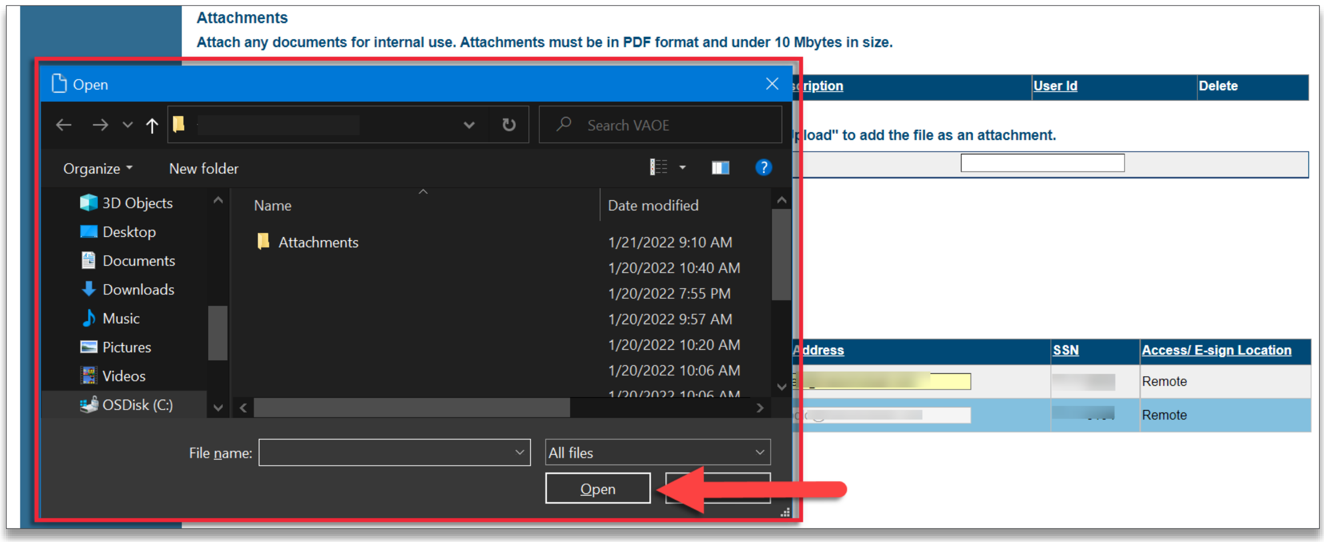
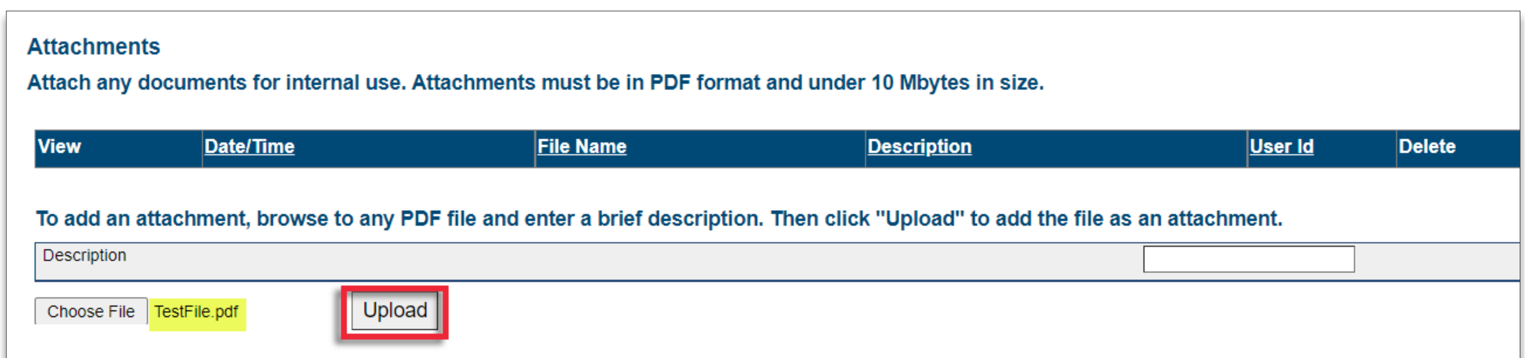
2. The **Open File window** displays. Locate and select the **applicable file** on the desktop then select **Open**.



Tips: The user may upload multiple forms as one file and/or upload multiple attachments. Upload PDF format only. The file cannot exceed 20 MBS.

3. The selected file displays; select **Upload**.



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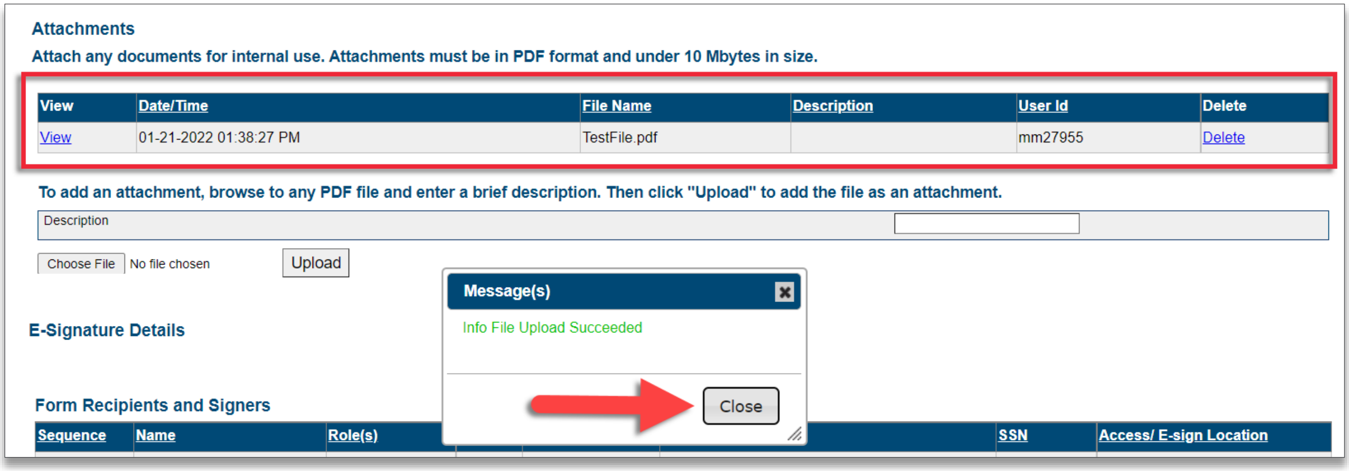
4. A **popup message** displays confirming the file was uploaded. Select **Close**. The uploaded file displays in the **Attachments section** on the **Forms Submit tab** (select **View** to open/view the file and **Delete** to remove the uploaded file).



5. Repeat steps 1 – 4 to upload additional files.

Tip: The platform does not submit the uploaded attachments until the user selects **Submit**.

Submitting an Order

Once all files are uploaded and attached, select **Submit**.

IMPORTANT! The order is not complete until it is submitted.

Note: A proxy may submit an order; however, the advisor must attest to the validity of the order and properly address all suitability questions, review the order for accuracy, and sign the required forms.

Mailing Paperwork

Mail checks and completed signed forms (e.g., 1035 exchange form, etc.).

- For fixed annuities, refer to the MassMutual Annuity Mailing/Lockbox Addresses & Who to Make Checks Payable To document for additional information.
- For variable annuities, refer to the MMLIS Contact List and MMLIS Payment Guide for additional information.