

## Transcript: Accenture Life and Annuity Software - SmartVideo Offering – Annuity

Hi James

Welcome to Immediate Annuity. Thank you for choosing us as your annuity provider.

We'd like to take a couple of minutes to talk to you about your immediate annuity contract, confirm your payout details, and tell you about some of our valuable online services.

In the next few days, you'll be receiving a phone call and your annuity contract by mail. Or you can access your account online to get that contract today and sign your delivery receipt. To get started, let's take a look at the details of your annuity contract. Here's where you can contact a knowledgeable representative to help guide you through your annuity contract. You'll see we received your initial contribution and your payout have been calculated accordingly. You'll be receiving your first annuity payment on the 15<sup>th</sup> of this month. Be sure to enroll in e-statements. You'll love the convenience of accessing your contract documents online anytime, anywhere. And while you're in your account, make sure to check out the helpful video tutorials for even more insight about your contract.

Speaking of your account, it appears you haven't designated a beneficiary for your contract. It only takes a minute. Simply go to the 'Add a beneficiary' section of your account and complete the fields.

We hope you'll take some time to explore your account. To access your contract overview section, download your annuity contract, or update your beneficiary information, just click on screen.