

# Amerilife / IMO Service Guidelines

## Nationwide Financial Business Relationship Management

<p>Solutions Center 1-800-321-6064</p> <p>M-F 8am - 8pm EST</p>	<p>Platinum Service 1-800-321-6064, option 9 x435-2071</p> <p>M-F 9am - 6pm EST</p>	<p>Business Relationship Manager</p> <p>NWIDC@nationwide.com</p>
<ul style="list-style-type: none"> <li>Contract Inquiries</li> <li>Contract Delivery Questions</li> <li>Contract Level Questions</li> <li>Post Issue Inquiries</li> <li>NB/Transfer/IGO Status</li> <li>Product Related Questions</li> <li>Product Training Process</li> <li>Website Questions</li> <li>Forms Assistance</li> <li>Illustrations</li> </ul>	<ul style="list-style-type: none"> <li>Research Inquires</li> <li>Rush Requests – Exceptions Only</li> <li>New Business Related Issue Resolution Requests</li> <li>New Business Related Error Corrections Requests</li> </ul>	<ul style="list-style-type: none"> <li>Datafeed Requests</li> <li>Back Office Escalation Requests</li> <li>Back Office Website Requests</li> <li>Firm Staffer IDs</li> <li>Global Issues</li> <li>Nationwide Process/Procedure Inquiries</li> <li>Reporting Requests</li> <li>Updates to Back Office Contacts</li> </ul>
<p>Contracting 1-800-321-6064, option 9 x435-3047 614-435-3047 nwagrmts@nationwide.com askagree@nationwide.com</p> <p>M-F 8am - 5pm EST</p>	<p>Licensing 1-800-321-6064, option 9 x435-1030 614-435-1030 bgalandc@nationwide.com</p> <p>M-F 8am - 5pm EST</p>	<p>Commissions 1-800-321-6064, option 9 x435-3037 614-435-3037 nfcomm@nationwide.com</p> <p>M-F 9am - 5pm EST</p>
<ul style="list-style-type: none"> <li>nwagrmts@nationwide.com should only be used for submitting new contracting or transfers from one IMO to another</li> <li>ASKAGREE@nationwide.com should be used for Agent Contracting Status</li> </ul>	<ul style="list-style-type: none"> <li>Licensing Inquiries</li> <li>Additional State Appointment Requests</li> <li>Product Training Inquiries/ Updates</li> <li>Agent Contracting Status</li> <li>ACH Routing Changes</li> <li>Address Changes</li> <li>Hierarchy Inquiries</li> </ul>	<ul style="list-style-type: none"> <li>Commission Inquires</li> <li>Chargeback Questions</li> <li>Commission Reporting</li> <li>1099 Tax Inquiries</li> <li>Commission Statement/Website Inquiries</li> </ul>
<p>Suitability</p> <p>Please contact the representative that originally sent the email or suitrev@nationwide.com</p>	<p>In Good Order/ Transfer Phone</p> <p>Please reply to the OPSNIGO@nationwide.com email or NBTransfers@nationwide.com via the initial email received</p>	<p>Post Issue Email</p> <p>Annuityresolution@nationwide.com</p> <p>M-F 8am - 6pm</p>
<ul style="list-style-type: none"> <li>All Suitability related questions</li> </ul>	<ul style="list-style-type: none"> <li>New business in good order issues should be replied to OPSNIGO@nationwide.com when email is received</li> <li>Transfer issues should be replied to NBTransfers@nationwide.com when email is received</li> </ul>	<ul style="list-style-type: none"> <li>Post issue escalations</li> <li>Post issue research</li> <li>Post issue exceptions</li> </ul>
<p>All Other</p>		
<p>Mailing Addresses</p>	<p><u>Regular</u> Nationwide Financial P.O. Box 182021 Columbus, Ohio 43218-2021</p>	<p><u>Overnight</u> Nationwide Financial 3400 Southpark Place Suite A DSPF-F4 Grove City, Ohio 43123-4856</p>

## Operations Service Level Agreements

Operations Team	Transaction Type	Service Level Agreement (SLA)
<b>Licensing and Contracting</b>	Appointments	10 business days
	Terminations	5 business days
	Address changes	5 business days
<b>New Business</b>	Financial	Same day
	Transfer Set up	2 business days
	Non-Financial	1-5 business days
<b>Suitability</b>	Initial Review for Suitability Approval	2-3 business days after NB processing
<b>Transfer Paperwork</b>	Transfer paperwork mailed or faxed	2 business days
<b>Transfer Phone</b>	Status Calls	2 business days after overnight package has been sent
		2 business days after sent via fax
	NIGO issues	Contact is made within 24 hours of receiving or finding a NIGO issue
<b>In Good Order (IGO)</b>	Hard NIGOs (includes licensing, financial business, training, etc.)	Contact made 1 business day
	Soft NIGOs (includes income start date, courtesy calls, verification of age, etc.)	Contact made 1-2 business days
<b>Solutions Center</b>	Calls answered	80% in 20 seconds
<b>Disbursements</b>	Withdrawals (partial/surrenders/outgoing transfers)	5 business days – fixed
	Systematic Withdrawals	3 business days
<b>Beneficiary Claims</b>	Death Notification	3 business days
	Death Benefit processing (fixed annuities)	3 business days
<b>Commissions</b>	nfcomm@nationwide.com responses	Less than 24 hours
	Commission Correction Requests / Account Changes	3 business days

### Operations Contacts

Nationwide	Amerilife
Business Relationship Manager	Janet Sipes
<a href="mailto:NWIDC@nationwide.com">NWIDC@nationwide.com</a>	Jsipes@Amerilife.com
866-789-3025	(727) 726-0726 ext. 72596
<a href="http://www.nationwidefinancial.com">www.nationwidefinancial.com</a>	<a href="http://www.Amerilife.com">www.Amerilife.com</a>