

# After-Issue Client Needs

## RESOURCES

We know your Clients are reaching out for many different servicing needs. Here are some helpful tips when you are working with your Clients.

### Client Self-Service

Clients can be in control of their policies through the online Customer Portal or the National Life Mobile App. As they manage their own administrative tasks, you will save time and be able to have more meaningful conversations with your Clients.

If your Client is not yet registered, here is how they can set up an account:

- Visit [www.nationallife.com/register](http://www.nationallife.com/register)
- Or download the National Life Mobile App from the Apple Store or Google Play store.

## Self-Service Features

### ▼ Update Contact Info

- Address
- Phone Number
- Email
- Notification Preferences

### ▼ Update Payment Information

- Make a One-Time Payment
- Skip/Postpone Payments
- Add/Stop Auto-Draft
- Increase/Decrease Payment Amount
- Change Bank Account
- Change Draft Date

### ▼ Review Policy Values

- Accumulated Cash Value
- Surrender Value
- Death Benefit
- Allocation Information/Interest Crediting
- Loan Availability
- MEC Limit

### ▼ Life Loan & Withdrawal Requests

- Loan or withdrawal requests, of up to \$50,000 annually, can be requested on the Customer Portal.
- No form/signature required.
- Only available for individually owned policies. Not available on joint-owned, trust-owned, or corporate-owned policies.
- If any concerns arise after the request is made, the Disbursements Team will reach out to the Client advising what additional information is required to proceed.
- Once the \$50,000 annual limit for online disbursement request(s) has been reached, the online requests can still be made, but will not be processed without a form/signature.

### ▼ Annuity Loan & Withdrawal Requests

- Loan or withdrawal requests can be initiated online, but forms/ signatures and TPA approval (if applicable) are still required.
- The benefit of this is to get the request in our workflow while the Client obtains the requirements.

### ▼ Additional Items

- Change beneficiary information for individually owned policies. Not available on joint-owned, trust-owned, or corporate-owned policies.\*
- Download form to change owner information.
- Initiate a claim\*

\*These features are only available on the Customer Web Portal.

## Agent Reference Materials

Need to help your Client with an after issue change and not sure what form to use?

- Reference [this guide](#) to understand which forms may be needed for specific requests.

Looking for some guidance on running an inforce illustration?

- View [this tutorial](#) on how to run an inforce illustration.
- Find step by step instructions [here](#). You will need to log in to the Agent Portal to access these instruction.
- If you need an inforce illustration for an Ultra, Uniflex, traditional or Paragon policy, please contact National Life Group.

## General Contact Information

### National Life Group Contact Center

Monday – Thursday: 8 a.m. – 7 p.m. EST

Friday: 8 a.m. – 6 p.m. EST

**1-800-732-8939 (customers)**

**1-800-906-3310 (agents)**

General Life Policy Questions, Inquiries, and Inforce Illustration Requests

[LifeCustomerService@NationalLife.com](mailto:LifeCustomerService@NationalLife.com)

General Annuity Policy Questions and Inquiries

[Service@NationalLife.com](mailto:Service@NationalLife.com)

EFT Billing — Life

[EFTTeam@NationalLife.com](mailto:EFTTeam@NationalLife.com)

General Billing — Life

[LifeBilling@NationalLife.com](mailto:LifeBilling@NationalLife.com)

General Billing — Annuity

[Billing@NationalLife.com](mailto:Billing@NationalLife.com)

Title

[TitleDepartment@NationalLife.com](mailto:TitleDepartment@NationalLife.com)

Contract Change — Life

[ContractChange@NationalLife.com](mailto:ContractChange@NationalLife.com)

Annuity Disbursements Questions

[LSWPolicyServices@NationalLife.com](mailto:LSWPolicyServices@NationalLife.com)

Annuity Forms

[Imaging@NationalLife.com](mailto:Imaging@NationalLife.com)

Life Disbursements

[Disbursements@NationalLife.com](mailto:Disbursements@NationalLife.com)

Claims

[Claims@NationalLife.com](mailto:Claims@NationalLife.com)

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