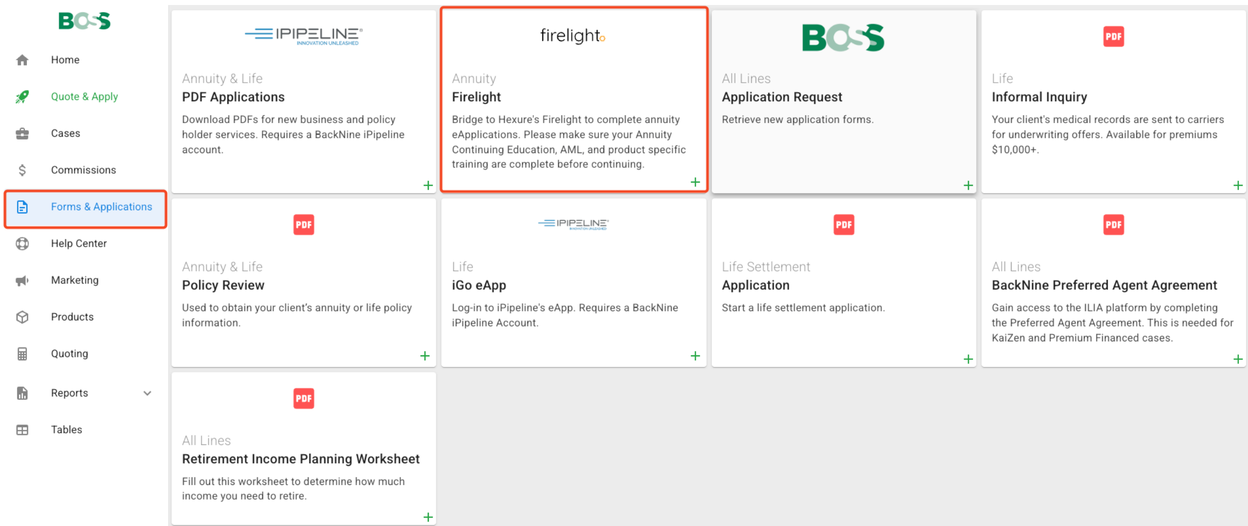
Annuity Order Entry Guide

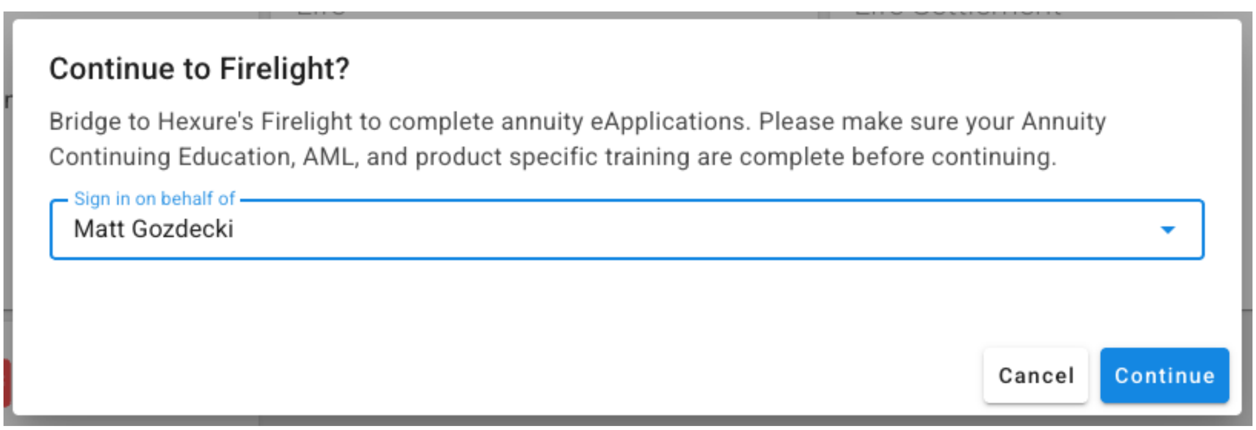
Currently supported carriers, updated 12/1/25

Allianz, American National, Atlantic Coast Life, Axonic Insurance Services, Corebridge, Delaware Life, F&G, Guaranty Income Life, Integrity Life, Lincoln Financial, MassMutual Ascend, National Life/LSW, North American, Oceanview, Oxford Life, Protective Life, Reliance Standard, Revol One, Sagicor, Securian, Sentinel Security Life, SILAC, The Standard, Symetra

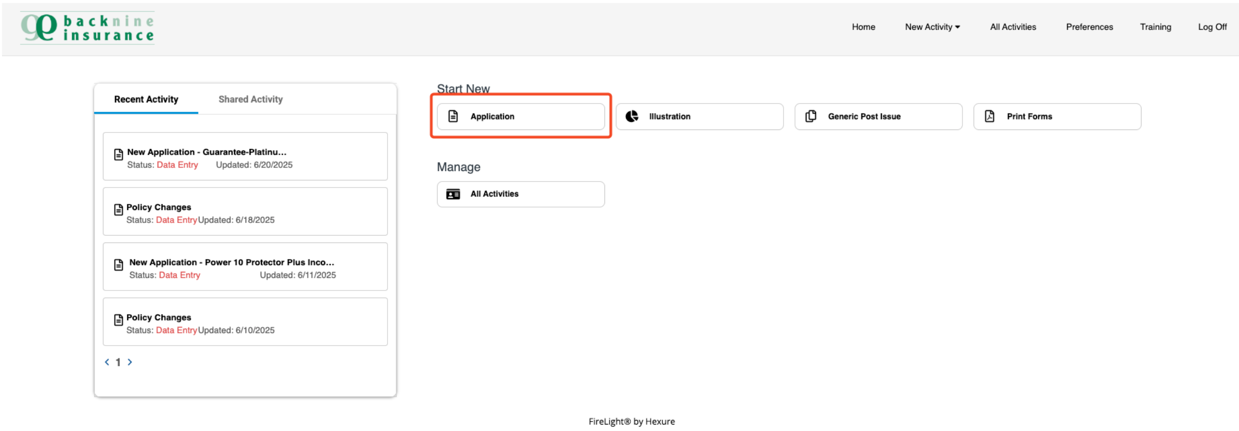
Step 1 – Access the Annuity order entry system through BOSS. Click on Forms and Applications on the left hand side of the page, then click on the second icon that says “Annuity – Firelight”



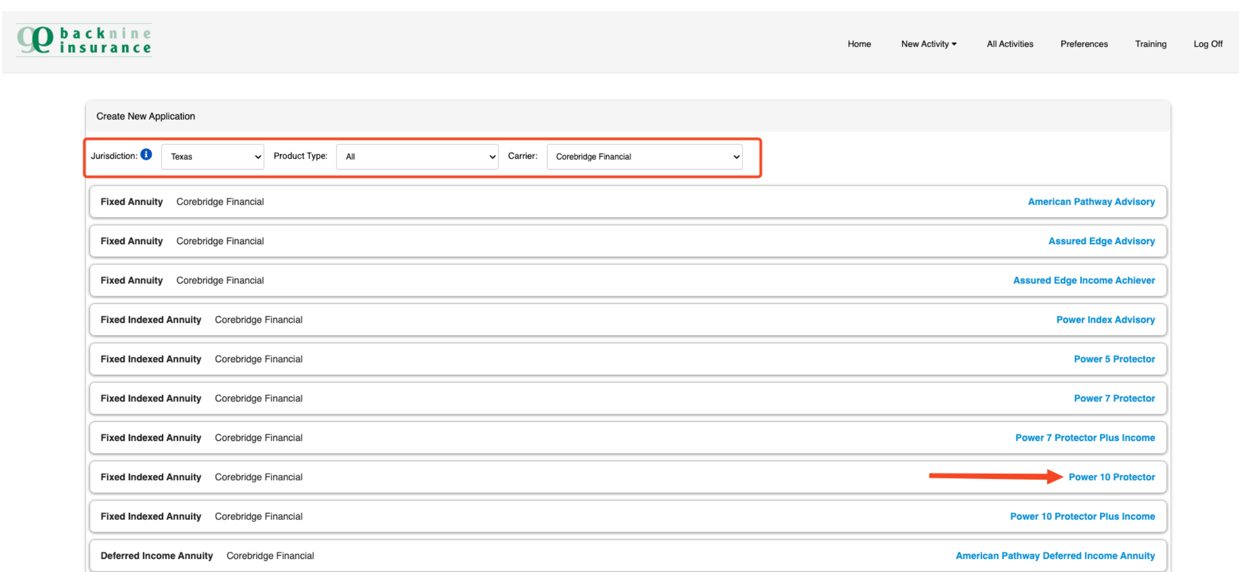
Step 2 – If you are part of a team, select the person who will be the writing agent on the application from the drop-down menu. Please also be reminded that you must have an appointment request into the carrier you’re looking to sell, and that you have completed all required trainings before proceeding. Click “Confirm” to continue.



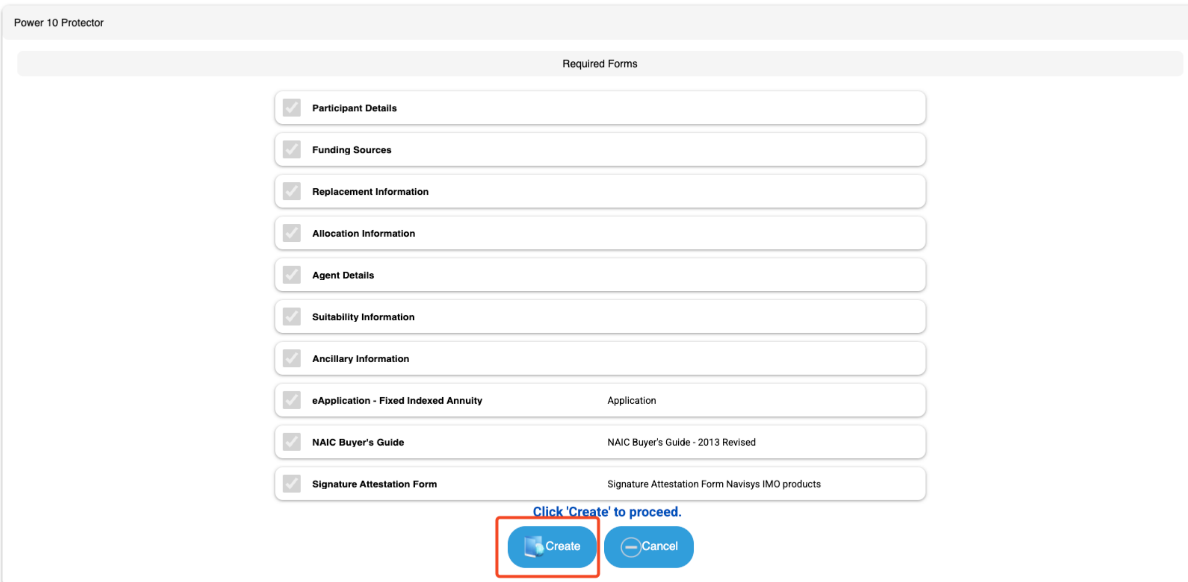
Step 3 – Click on “Start New: Application” to begin.



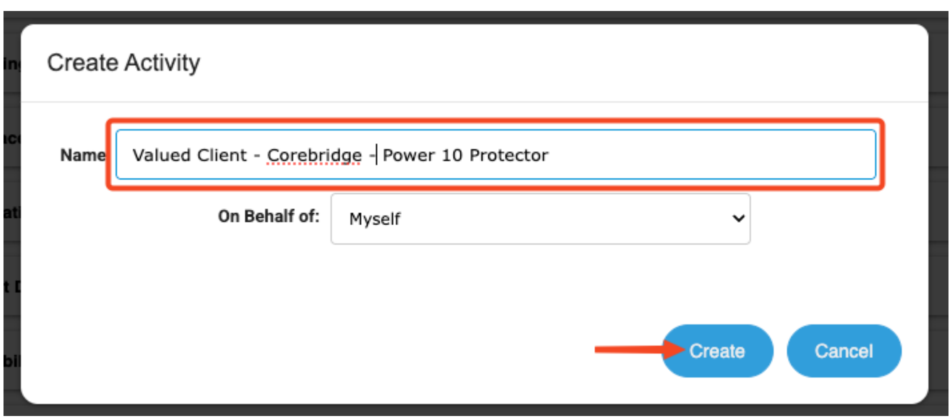
Step 4 – Select the client’s state for Jurisdiction, leave Product Type as “All,” and the carrier you want to use. Then select your desired product from the menu. For example, if we were writing Corebridge’s Power 10 Protector for a Texas client, it would look like the screenshot below.



Step 5 – All of the required forms will automatically be selected, and you can add any additional forms you might need to the bundle. Then click on “Create” to start the application.

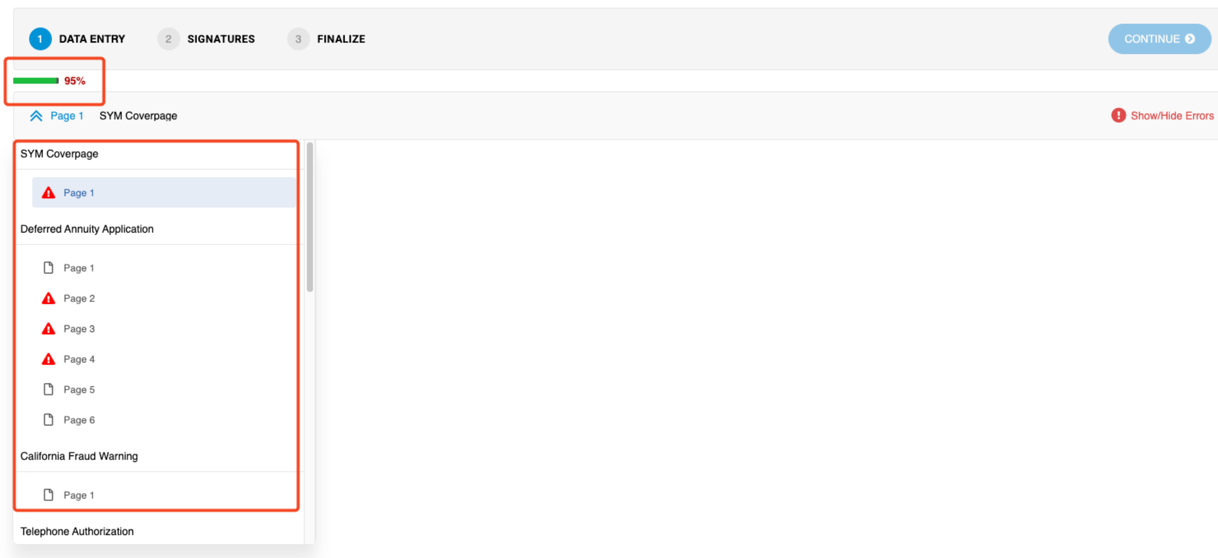


Step 6 – Name the application so you’ll be able to easily identify it, then click on create



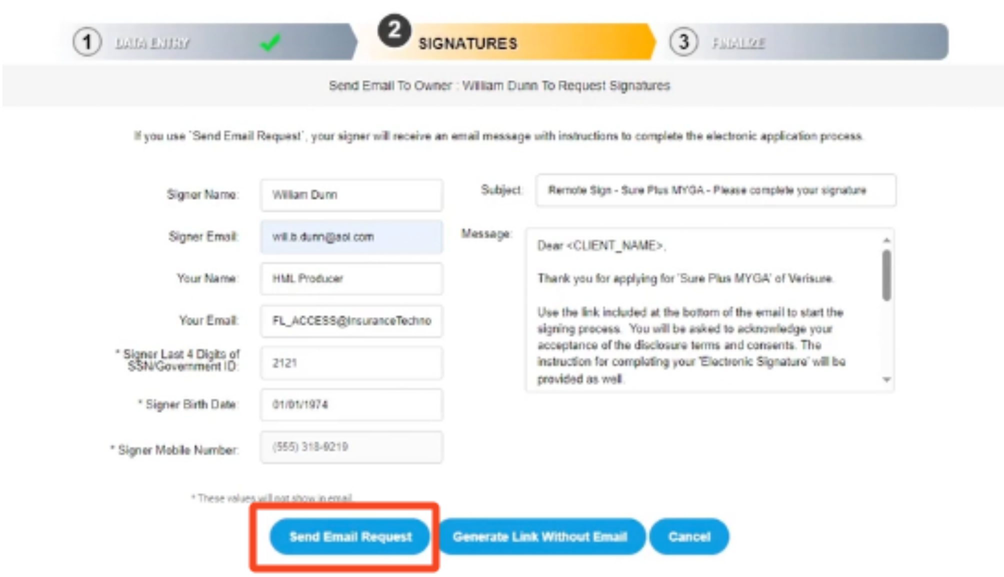
Step 7 – Firelight is easy to use and intuitive – you will not be able to submit an incomplete application, common answers are copied across forms, and errors are highlighted for correction. Your progress is tracked in the menu in the top left, and you can expand the different forms to see where errors or corrections are needed.

Once your application is 100% complete, you will be able to proceed to the Signatures portion by clicking Continue in the top right.

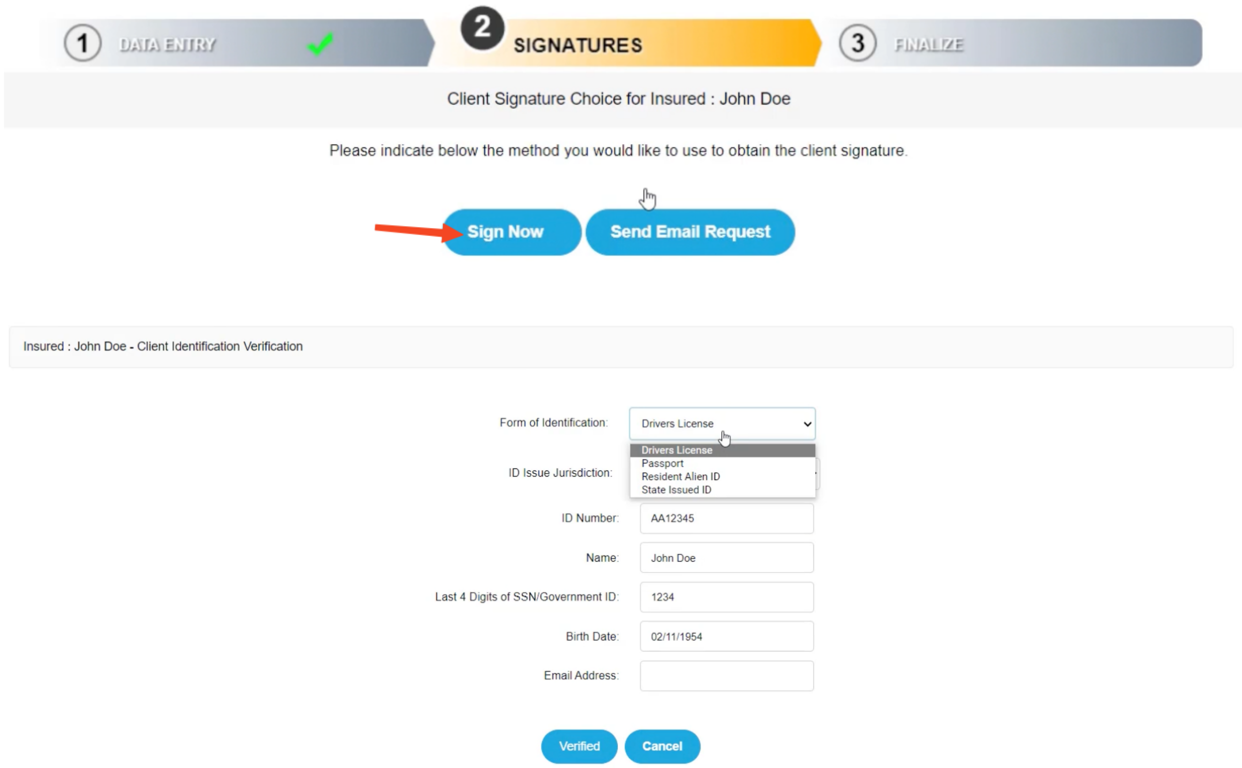


Step 8 – You will then decide if you are going to use the e-signature process or if you will collect signatures on paper. Click on the appropriate button:

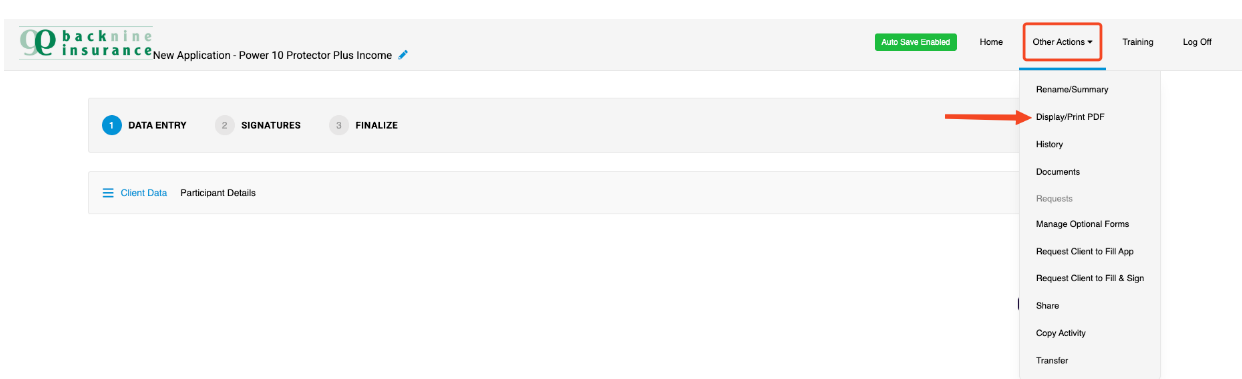
Step 9a – <u>If e-signing via email</u>, select your client's name, review the message you're sending to the client, then click "Send Email Request." The email will come from "**<u>no-reply@firelighteapp.com</u>**" so be sure to tell your client to check their spam/junk email if they do not see it.



Step 9b – If e-signing in person, you'll click on your client's name, but instead click on "Sign Now" as pictured below. You will need to verify the client's ID information in the system, then it will take you to the application for review and signature.



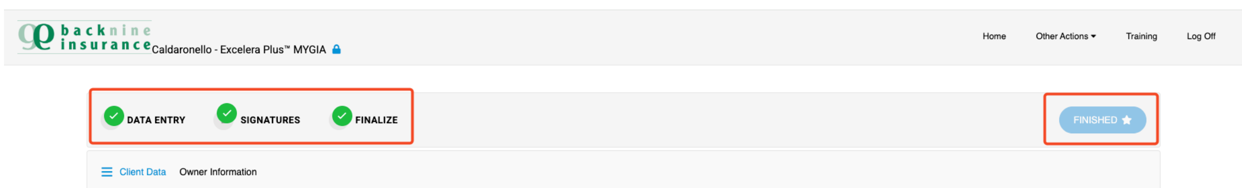
Step 9c – If you want to print the documents and get wet signatures, decline the signature process, and click on the "Other Actions" menu, then select Display/Print PDF.



Step 10 – Once you and your client have signed, you still must "Finalize" the application – to do this, click on the Submit button in the top right.

Your application will look like the picture below once completed. If you don't see the three green checkmarks and the "Finished *" icon, you still need to complete the e-app process.

IMPORTANT: If you do not complete this last step, your business will not be submitted to the carrier.



Congratulations! Your e-app will automatically be routed to the annuity carrier and you will see a file set up in the "Cases" tab in BOSS!

You'll be assigned a Case Manager who will contact the carrier every business days (or as necessary based on carrier review turnaround times) to obtain status updates and relay pertinent information back to you.

Please note: BackNine does not provide post-sale service support. Please work directly with the carrier if servicing forms or requests are need on your app.

Thank you for trusting BackNine with your annuity business!