



Simplify the order of annuity products!

EZAnnuity

Learn more on Infinet's My University on-demand training:

- Infinet - New Account > EZAnnuity!
- Osaic Institutions University also has an EZAnnuity Guide and EZAnnuity FAQ Reference for those that prefer printed guides.
- EZAnnuity eligible companies and products are located on Infinet's searchable Approved Products page.
- "In good order" rates for advisors using EZAnnuity are 90% or higher! (Data from Insurance Technologies, 2018)

Add value to your practice

EZAnnuity simplifies how you process, service, and maintain annuities. This frees up valuable time for advisors. Instead of focusing on transactional details, prioritize the overall client experience and capture a greater share of the market.



Using Infinet's New Account Workflow and familiar technology, place direct orders for many popular annuity products to streamline the entire process for both you and your clients!

EZAnnuity features & benefits



Company and state-specific forms are automatically added and updated!



A cohesive approval and audit workflow reduce processing hassles.



Electronic signature integrations enhance the platform's convenience.



Business is completed and policies are quickly issued—the EZ way.



Infinet and insurance company data pre-populate to save you valuable time.

NOT FOR DISTRIBUTION TO RETAIL INVESTORS. Investment and insurance products and services are offered through **Osaic Institutions, Inc.**, Member FINRA/SIPC. **Osaic Institutions** and the bank/credit union are not affiliated. Products and services made available through **Osaic Institutions** are not insured by the FDIC/NCUA or any other agency of the United States and are not deposits or obligations of nor guaranteed or insured by any bank, bank affiliate, credit union, or credit union affiliate. These products are subject to investment risk, including the possible loss of value.