



Annuity Illustration

Log into your Athene Account.

The screenshot shows the Athene Connect dashboard. At the top left is the Athene logo and the word "Connect". On the top right, there is a notification bell icon and a "My Account" dropdown menu. Below this is a navigation bar with several menu items: "My Business", "Products", "Retirement Strategies", "Sales & Service Tools", "Insights", "Rules & Guidelines", "News", and "Support".

The main content area features two prominent notification boxes. The first is orange and contains a warning icon, the text "Staff expiration date: 01/01/2025", a sub-message "Keep your staff up to date. All staff must be reviewed to have access to Athene Connect.", and a blue "Review Staff" button. The second is light blue and contains a smartphone icon, the text "Set Up Authenticator App", a sub-message "The fastest login verification option", a blue "Set Up Now" button, and a close "x" icon.

Below the notifications is a horizontal bar with three buttons: "Run an Illustration" (with a pencil icon), "Order Forms & Materials" (with a shopping cart icon), and "Access FireLight/e-Services" (with a house icon).

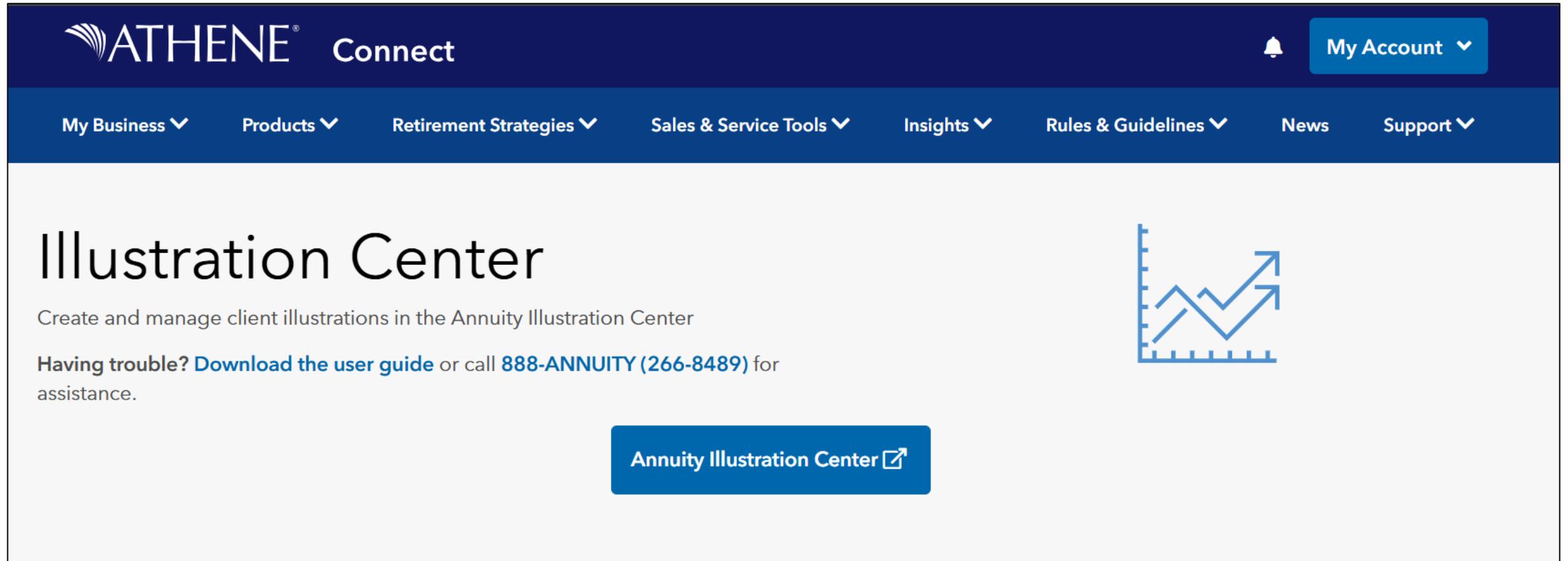
A dark header bar displays the user's name "Carlos Fernando Enriquez" on the left and "Dashboard Preferences" with a gear icon on the right.

At the bottom, there are two panels. The left panel is titled "My Business Overview" and shows a table with a row for "Premium Year-to-Date" with a value of "\$0.00". The right panel is titled "Quick Search" and shows a "Search Type" field.

Click on “Sales & Service Tools” tab, and select the “Illustration Center” option.

The screenshot shows the top navigation bar of the ATHENE Connect website. The header is dark blue with the ATHENE logo and 'Connect' text on the left. On the right, there is a notification bell icon and a 'My Account' button with a dropdown arrow. Below the header is a secondary navigation bar with several menu items: 'My Business', 'Products', 'Retirement Strategies', 'Sales & Service Tools', 'Insights', 'Rules & Guidelines', 'News', and 'Support'. The 'Sales & Service Tools' menu is currently expanded, revealing a list of options: 'Forms & Materials', 'Sales Toolkits', 'Illustration Center', 'Electronic Servicing', 'Document Upload', 'Ad Review', and 'Athene Store' (with an external link icon). At the bottom of the page, a notification banner is partially visible, showing a green checkmark icon and the text 'Set Up Authenticator App'.

Click on the “Annuity Illustration Center button” which will take you to a new website tab to do the illustration.



The screenshot shows the ATHENE Connect website interface. At the top left is the ATHENE logo and the word "Connect". To the right is a notification bell icon and a "My Account" button with a dropdown arrow. Below this is a navigation bar with links for "My Business", "Products", "Retirement Strategies", "Sales & Service Tools", "Insights", "Rules & Guidelines", "News", and "Support", each with a dropdown arrow. The main content area features the heading "Illustration Center" and a sub-heading "Create and manage client illustrations in the Annuity Illustration Center". To the right of this text is a line graph icon showing an upward trend. Below the sub-heading is a link: "Having trouble? Download the user guide or call 888-ANNUITY (266-8489) for assistance." At the bottom center is a large blue button labeled "Annuity Illustration Center" with an external link icon.

ATHENE Connect

My Business Products Retirement Strategies Sales & Service Tools Insights Rules & Guidelines News Support

Illustration Center

Create and manage client illustrations in the Annuity Illustration Center

Having trouble? [Download the user guide](#) or call **888-ANNUITY (266-8489)** for assistance.

[Annuity Illustration Center](#)

Once your on the new website tab it will look like the one below on the picture. Select the product you want to quote.

The screenshot displays the ATHENE web application interface. At the top, there is a dark blue header with the ATHENE logo on the left, a navigation bar with 'Open Items (0)' and 'Help' buttons, and a 'Show Alerts' button on the right. Below the header is a sidebar with four main menu items: 'Home', 'New Case', 'Case Management', and 'Contact Management'. The main content area is divided into three tabs: 'Start Illustration' (selected), 'Unsaved Items', and 'Preferences'. Under the 'Start Illustration' tab, there is a section for 'Illustration Method' with a dropdown menu set to 'Illustrate by Product'. Below this is the 'Create New Illustration' section, which contains three input fields: 'Rate Determination Date' (7/9/2025), 'Issue State' (California), and 'Product Type' (All). At the bottom of this section is a table with two columns: 'Product Name' and 'Description'. The table lists seven products, all of which are Fixed Indexed Annuities, except for 'Athene MaxRate' which is a Multi-Year Guaranteed Annuity and 'Athene Activate SPIA' which is a Single Premium Immediate Annuity. On the right side of the main content area, there is a 'Recent Cases' section with a single entry: 'Alfredo Guzman 1'.

ATHENE Open Items (0) Help Show Alerts

Home New Case Case Management Contact Management

Start Illustration Unsaved Items Preferences

Illustration Method

Illustrate by Product

Create New Illustration

Rate Determination Date: 7/9/2025

Issue State: California

Product Type: All

| Product Name | Description |
|-------------------------------|----------------------------------|
| Athene AccuMax | Fixed Indexed Annuity |
| Athene Agility | Fixed Indexed Annuity |
| Athene Ascent Pro Bonus | Fixed Indexed Annuity |
| Athene Performance Elite | Fixed Indexed Annuity |
| Athene Performance Elite Plus | Fixed Indexed Annuity |
| Athene MaxRate | Multi-Year Guaranteed Annuity |
| Athene Activate SPIA | Single Premium Immediate Annuity |

Recent Cases

Alfredo Guzman 1

A window will open where you'll have to enter your client information. Once you done that click on "OK".

Start Illustration

Input Client | Select Contact

First Name: Valued

Last Name: Client

Birthdate: 7/9/1980

Age: 45

Gender: Male

Illustration

Case Name: Valued Client

OK | Cancel

Start Illustration | Unsave

Illustration Method

Create New Illustration

Product Name

- Athene AccuMax
- Athene Agility
- Athene Ascent Pro Bonus
- Athene Performance Elite
- Athene Performance Elite
- Athene MaxRate
- Athene Activate SPIA

Multi-Year Guaranteed Annuity

Single Premium Immediate Annuity

On “Client” tab you’ll check the client’s information, select the issue state and on Owner information select if is individual, joint, or other.

The screenshot displays the ATHENE software interface. At the top, there is a navigation bar with the ATHENE logo, buttons for 'Open Items (1)', 'Save', 'Close', and 'Help', and a 'Show Alerts' button. On the left side, a vertical menu contains buttons for 'Home', 'New Case', 'Case Management', 'Contact Management', and a section for 'Kimberly Client' with sub-buttons for 'Athene Activate SPIA', 'Quick View', and 'Print as Selected'. The main content area is divided into three tabs: 'Client', 'Policy Details', and 'Reports'. The 'Client' tab is active, showing three sections: 'Illustration', 'Annuitant Information', and 'Owner Information'. The 'Illustration' section includes fields for 'Rate Determination Date' (7/8/2025), 'Issue State' (California), and 'Tax Qualification' (Non-Qualified). The 'Annuitant Information' section has two sub-sections: 'Annuitant' with fields for 'Client' (Kimberly Client), 'Issue Age' (57), and buttons for 'Edit' and 'New'; and 'Joint Annuitant' with fields for 'Client' (None) and 'Issue Age'. The 'Owner Information' section has a field for 'Owner Type' (Individual(s)). On the right side, there are two summary boxes: 'Key Information' showing client details (Kimberly Client, Female, Age 57, Issue State: California, Product: Athene Activate SPIA, Producer: Carlos Enriquez) and 'Summary Values' showing financial details (Premium: \$25,000.00, Deposit Date: 07/08/2025, First Payment Date: 08/08/2025, Payout Frequency: Annual, Initial Payment: \$1,576.75).

Owner Information

Owner Type:

Owner

Client:

[Edit](#)

[New](#)

Issue Age:

Joint Owner

Client:

[Edit](#)

[New](#)

Issue Age:

After filling the previous tab, on policy details you'll select the options you want for your client's quote.

| | | |
|-----------------------------|----------------|---|
| Client | Policy Details | Reports |
| Payout Options | | |
| Payout Type: | Certain | ▼ |
| Certain Years: | 10 | |
| Payout Frequency: | Monthly | ▼ |
| Annual Automatic Increase: | 0% | ▼ |
| Primary Payout %: | | ▼ |
| Initial Contribution | | |
| Deposit Date: | 7/8/2025 |  |
| First Payment Date: | 8/8/2025 |  |
| Premium Option: | Input Premium | ▼ |
| Input Premium: | \$12,267.00 | |
| Cost Basis: | \$0.00 | |

On the right side you'll see the Key information, and below the summary values, which will be changing according to the information you select.

Certain Years:

Payout Frequency:

Annual Automatic Increase:

Primary Payout %:

Initial Contribution

Deposit Date:

First Payment Date:

Premium Option:

Input Premium:

Cost Basis:

Can-Sell Status

Agent ID:

Can-Sell Status:

Key Information

Kimberly Client
Female, Age 57

Issue State
California

Product
Athene Activate SPIA

Producer
Carlos Enriquez

Summary Values

| | |
|---------------------|-------------|
| Premium: | \$12,267.00 |
| Deposit Date: | 07/08/2025 |
| First Payment Date: | 08/08/2025 |
| Payout Frequency: | Monthly |
| Initial Payment: | \$123.60 |

Upon finishing the policy details tab, go to “Reports” tab, fill the producer information, the click on “Print Illustration as Selected”.

Client Policy Details Reports

Reports Display

- Athene Activate SPIA
- Payout Reports ?

[Print Illustration as Selected](#)

Producer Information

First Name: [Select Producer](#)

Last Name: [Select Producer](#)

License Number:

Business Name: [Select Producer](#)

Address: [Select Producer](#)

City: [Select Producer](#)

Jurisdiction: [Select Producer](#)

Zip: [Select Producer](#)

Phone Number: [Select Producer](#)

It will generate the quote for your client, review that everything is correct before download it and send it to your client.

ReportDisplay.ashx | 1 / 5 | 100% | [Navigation icons]

ATHENE | Athene Activate™
Driven to do more.® | A Single Premium Immediate Annuity (SPIA)

A **Single Premium Immediate Annuity** designed to activate guaranteed income.

At Athene, we believe retirement isn't the end of a job. It's the beginning of your life's best work. That's why we're driven to deliver financial solutions that outperform so you can dare to dream big. Backed by the strength and stability of a market leader, Athene annuities are built to give you the confidence to retire...better.

Athene Activate can meet you wherever you are in your retirement journey. Choose from a variety of payment options designed to initiate your "retirement paycheck."

| | |
|---------------------------------|--|
| Quote Date: | July 08, 2025 |
| Rate Determination Date: | July 08, 2025 |
| Prepared For: | Kimberly Client |
| Prepared By: | Carlos Enriquez 6167 Bristol Pkwy Unit 106 Culver City, CA 90230 2134780090 info@epbrokerage.com |

This is an illustration and not a contract. The purpose of this illustration is to show how a single premium immediate annuity works. Assumptions on which figures are based are subject to change by the insurer.

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Please refer to the Product Guide, if available, for additional information.