

**** Informational Data Sheet for our Advisors ****

A few things to keep in mind with our Forethought 'SnapApp' solution:

- ✓ **If your contract was funded with a 1035 Exchange:** those document(s) need to be printed out, signed by yourself and the Client(s), then sent to your Back Office, per the current operating procedures.
- ✓ **If, during the submission process, you receive a message indicating you have not completed your Product Training:** complete your training by following these steps:
 - Log into (and register if it's your first time): <https://secure.reged.com/TrainingPlatform>
 - Click on "Product Code" and type "FTINCOME150" (150 + Product Training) for the training
 - Print the certificate and fax to 800-668-5072 or email it to licensing@forethought.com
 - After training is credited, return to the SnapApp system and "Submit" the order to complete the Signature process and submit for processing; *otherwise, the order will not be sent for processing.*
- ✓ **If you are sending an Email to your Client for the eSignature process:** once the Client responds and completes that process, return to the SnapApp system and "Submit" the order for processing. The completion of eSignature does not automatically submit the application. It must be submitted by you.
- ✓ **If you have additional supporting client documents that are available electronically:** you can upload and include them (must be a PDF) with your submission by following these steps:
 - In the upper right hand corner, select "Other Actions"
 - Select the document type
 - Select "Choose File" to find the file on your device
 - Click "Upload" to attach the file
- ✓ **If your client does not agree to the Electronic Document Disclosure:** you cannot go past the "Form Entry" status to get electronic signatures. All document(s) need to be printed out; signed by yourself and the Client(s); then sent to your Back Office per the current operating procedures.
- ✓ **If you have any questions or issues during your eApplication process:**
 - Contact your ForeThought support team at (877) 244-7526
 - Or contact your Back Office

This informational page will also appear as a reminder during the SnapApp process.

We thank you for leveraging our e-Application Platform for your business transaction, and we do hope your experience was positive.

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