

American National Selects iPipeline AFFIRM for Annuities to Automate Advisor Selling Process

Advisor Order-Entry Solution Provides Customized Workflows and Reviews to Support FINRA, SEC and State Compliance

Exton, PA (August 19, 2014) – iPipeline® – the leader in on-demand marketing, selling, and processing solutions for the nation’s top insurance carriers, distributors, financial institutions, producers, and advisors – today announced American National Insurance Company, one of the nation’s leading providers of life and annuities products, has selected AFFIRM® for Annuities to automate the advisor selling process. The wizard-based solution streamlines the order-entry process and supports customized workflows and suitability reviews, enabling financial institutions to meet their requirements for FINRA, SEC and state compliance.

“The AFFIRM for Annuities compliance and order management solution was used to process nearly \$16 billion in annuities in 2014, and this number continues to grow as it has become the product of choice among top-tier financial institutions. By combining the carrier’s complex product rules with the institution’s compliance processing needs, iPipeline has been able to positively impact how advisors do their daily jobs while generating 100% ‘in Good Order’ transactions,” said Tim Wallace, CEO, iPipeline. “American National’s decision to deploy the next-generation solution speaks to the broad acceptance and use of AFFIRM in North America today. We are pleased to have American National as an AFFIRM carrier customer.”

“To optimize sales, advisors need access to a platform that fully automates the order-entry process while adhering to specific workflows and suitability reviews. American National selected iPipeline AFFIRM for Annuities because it enables our financial institution partners to achieve industry compliance while contributing to the volume of products sold and our joint success,” said David Behrens, Executive Vice President, Independent Marketing Group, American National. “American National views technology as a differentiator in the market place and business accelerator. We continue to invest in our company’s infrastructure and view modernizing the annuity selling process as critical to our sustained growth.”

To learn how you can implement iPipeline’s next-generation solutions to accelerate the marketing, selling and processing of life, annuity, and health products, contact sales@ipipeline.com or call 1-800-758-0824, option 2.

About American National

American National Insurance Company (American National), headquartered in Galveston, Texas, was founded in 1905 and is licensed to conduct the business of insurance in all states except New York. American National has been assigned an ‘A’ rating by A.M. Best Company and an ‘A’ rating by Standard & Poor’s, both of which are nationally recognized rating agencies. American National is also a family of companies and offers a broad line of products and services, which includes life insurance, annuities, health insurance, credit insurance, pension products and property and casualty insurance for personal lines, agribusiness, and certain commercial exposures. The family of companies operates in all 50 states. For corporate and investor relations information, visit American National’s web site at www.anico.com.

To better serve the unique insurance needs of our independent distributors, American National established the Independent Marketing Group in 1994. Through this division, life insurance, annuities and pension plans for small businesses are offered through independent marketing organizations, broker dealers, financial institutions and employee benefit firms. For more information please visit www.img.anicoweb.com.

About iPipeline

iPipeline leads the industry in providing the next-generation suite of sales distribution software to the insurance and financial services markets through its on-demand service. iPipeline’s channel solutions for carriers, distributors, and financial institutions automate activities for health class estimation, CRM, forms distribution and processing, quotes and illustrations, e-Applications, agency management, data services, policy delivery and policy holder services, enabling the entire industry to market, sell, and process faster.

iPipeline provides the process automation and seamless integration needed on a global basis to make a sale by aggregating approximately 125 carriers, 1,200 distributors and financial institutions, and their producers and licensed advisors in a Web-based environment – the iPipeline Customer Network. With headquarters in Exton, Pennsylvania, iPipeline has locations in Atlanta, Charlotte, Danville, Fort Lauderdale, Milwaukee, Salt Lake City, Tokyo, UK, and Vancouver. Visit us at www.ipipeline.com.

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