

DTCC Insurance & Retirement Services

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Message from the Managing Director

Please be sure to visit our website for an updated message from Adam Bryan, Managing Director, DTCC Insurance & Retirement Services. Here Adam will share with you his perspective on the past year and where we are headed in 2009, working with our customers and the industry.

Winter IQ Coming Soon

Last year we began distribution of our new Insurance & Retirement Services news publication now titled Insurance Quarterly (IQ). Shortly we will be distributing our winter edition. In this issue we cover a wide array of topics in an effort to keep you updated on our business, both what has happened over the last several months and what is happening in the coming months. If you would like a copy of IQ or your firm is interested in contributing articles to this publication, please contact Christopher Poisella, Marketing Manager at 212-855- 5709 or cpoisella@dtcc.com.

Customer Satisfaction Survey

Our Corporate 2009 Customer Satisfaction Survey will be sent out shortly. We strongly urge those of you who receive the survey to complete it, as this is an important mechanism for DTCC to measure our success and/or uncover areas for improvement. The survey will consist of two waves sent via the web; one will be distributed in early March and the other in early June. Each wave will use the same questionnaire. In addition to the web survey, a small number of DTCC senior customer contacts will be surveyed via the telephone during the second wave and will be asked a combination of tactical and strategic questions. We would like to thank you in advance for participating and helping us provide better service to our customers.

Self Service Password Management

At DTCC, we just made passwords a little easier for our customers. We are excited to inform you of our new Self Service Password Management program that offers a simple and secure way to manage your DTCC passwords. For more information click [here](#).

Upcoming Industry Events We Are Attending

March 11-13

Blue Frog User Group Meeting (Orlando, FL)

LNA AccessSM Enhancements

The approved LNA Access enhancements will be included with the regularly scheduled March 2009 release. A complete revised list (dated: February 23, 2009) of these enhancements is under the link labeled "LNA Access Requirements Addendum" on our website. Please take a moment to review this document. These enhancements are scheduled to be available in the PSE (user testing environment) for your review and testing with your trading partners beginning the evening of March 5, 2009. All enhancements will be migrated and made available in Production beginning March 20, 2009. Please contact your Relationship Manager or Cory Stark, 212.855.1683 or cstark@dtcc.com, if you have any questions.

IFT AccessSM

We will be hosting a conference call for interested parties related to a new product in development similar to LNA AccessSM. IFT Access would provide online screens to capture data that would complete representative of record (REP) or brokerage identification number (BIN) changes. IFT Access could also include other in force transactions such as address changes and pre-replacement inquiries. For more information please contact your Relationship Manager.

Attachments

Several firms have successfully tested the functionality. Throughout 2009 we will be extending the usage of Attachments to include additional use cases beyond new business. Please contact Craig Gurien or your relationship manager to sign up for additional information and to participate in a future pilot group.

Replacements

Later in 2009, "Replacements" will automate and standardize exchanges from one carrier to another for annuity and life insurance products.

Pilot Participants Needed

We are looking to finalize participation in the pilot group for Replacements and need companies to participate. In addition we are also looking for companies to assist in the analysis for pre-replacements. If your firm is interested, please contact Cory Stark at cstark@dtcc.com or 212.855.1683 or your relationship manager.

We may provide you with additional information about our products and services from time to time. If at any time you wish to be removed from our distribution list, please send an e-mail to privacyoffice@dtcc.com.



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