

# DTCC Insurance & Retirement Services

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## NOW LIVE: Analytic Reporting for Annuities

Analytic Reporting for Annuities from The Depository Trust & Clearing Corporation (DTCC) is a new online solution offered by Insurance & Retirement Services. The system will revolutionize the way the annuity industry discovers key trends and identifies opportunities for growth by maximizing your intelligence, growing your business and building your market. Based on the transactions and processes your firm entrusts to DTCC, this innovative service provides a unique view of the market for annuity products. The first service of its kind from DTCC, Analytic Reporting for Annuities aggregates the daily transactions processed by Insurance & Retirement Services utilizing the Financial Activity Reporting (FAR) file in an online information solution. This new product is housed on DTCC WebDirect and provides members with a unique view of their own business performance and relationships, as well as benchmarking to understand their relative performance and market position.

As our client base grows, we will continue to work with Customers so that they can become familiar with the service. We have been — and will continue — hosting a series of industry demos. We have added a new page to our web site and in addition, you can read the press release announcing the service by clicking [this link](#). If you have any questions or would like a demo of this service, please contact your relationship manager.

## WE ARE HAPPY TO ANNOUNCE WE ALREADY HAVE 5 USERS OF THE ANALYTIC REPORTING SERVICE.

## Stay Connected with Insurance & Retirement Services

As we continue to look for ways to keep our customers and the industry connected to news and information related to our business, we will begin posting more frequent updates on DTCC News such as new members, website updates, meeting minutes etc. Follow us on twitter at [www.twitter.com/dtccinsurance](http://www.twitter.com/dtccinsurance) or on our LinkedIn group that can be found here. Simply request to join the group. As always, we thank you for your continued support.

## NAIC Producer Training Support

I&RS recently enhanced its LNA service to support producer training completions from training vendors to carrier and distributor organizations. Plans are underway for additional LNA enhancements to support training completions from carriers to their distributors, offer a training completion report to distributors through the Access platform, and to create a centralized messaging platform to support point of sale training authorizations. For more information regarding DTCC's multi-phased initiative for producer training, please contact your relationship manager or Lana Macumber at (515) 462-3488 or [lmacumber@dtcc.com](mailto:lmacumber@dtcc.com).

## ACCESS PLATFORM: See a Demo Today!

DTCC I&RS offers a low cost, low effort, direct desktop connection to CORE solutions, to quickly streamline your annuity/insurance processing. We have launched the Access Platform, which allows distributors to submit their transactions without the need for resources, build or implementation to the majority of the industry's largest carrier partners. Today, this is available for LNA Access, IFT Access and Attachments Access. To learn more about the services provided on the Access Platform, please contact your relationship manager to schedule a demo.

## UPDATE: RECONFIRMATION OF OFAC PROGRAM

NSCC published Important Notice #a7236 on June 29, 2011 to Members and Limited Members of NSCC to remind them of their expiring OFAC certification letter on file and to announce the new electronic re-certification process to confirm their OFAC Program. It should be noted that the new OFAC Confirmation application that will be used to perform the confirmation will be launched at the end of August 2011 and the entitlement for the new application will not be available until that time. As such, you do not have to take any actions until after implementation in late August. As stated in the above-referenced Important Notices, NSCC will notify Members and Limited Members of their expiring OFAC Confirmation letter 90 days prior to the expiration date. Any questions regarding this program should be directed to your Relationship Manager.

For more information on the services listed in e-news please be sure to visit our website at: <http://www.dtcc.com/products/insurance>

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](mailto:privacyoffice@dtcc.com).



The Depository Trust &  
Clearing Corporation

DTCC Insurance & Retirement Services are provided by  
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