

DTCC Insurance & Retirement Services

E-NEWS • June 2011

NOW LIVE: Analytic Reporting

We are pleased to announce that the first official release of Analytic Reporting for Annuities is now live. Special thanks go to our Analytic Reporting advisory group and our Senior Advisory Board for all of their support and guidance on the development of this new service. The first service of its kind from DTCC, Analytic Reporting for Annuities aggregates the daily transactions processed by Insurance & Retirement Services in an online information solution. This service will provide our members with a unique view of their own business performance and relationships, as well as benchmarking to understand their relative performance and market position. To help you become familiar with the service we added a new page to our web site. In addition, you can read the press release announcing the service by clicking this link. If you have any questions or would like more information please contact your relationship manager.

Producer Training Support

I&RS recently enhanced its Licensing and Appointment (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.

DTCC Customer Support: Customer Help Line

As you may already know, DTCC offers a Customer Support Line for issues relating to file transmissions, testing, registration, password resets etc. For your convenience, please utilize this support tool to enhance your client experience and have your issues solved both quickly and efficiently.

CUSIP Profile

Please be reminded that the CUSIP Update Form was discontinued as of January 18, 2011. CUSIP Updates must now be made through CUSIP Profile. Please make sure those responsible at your firm are set up with Super Access Coordinators and Access Coordinators in order to obtain access. For more information, please contact your relationship manager.

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. I&RS have launched the Access Platform which allows distributors to submit their transactions to the majority of the industry's largest carrier partners. Today this includes LNA Access, IFT Access (BIN/REP) and Attachments Access (New Business). To learn more about the services provided on the Access Platform, please contact your relationship manager to schedule a demo.

NEW: My Access!

My Access is the new home for Insurance Web applications currently accessed from the DTCC Portal. The new page will be the only way to access your applications starting on June 30, 2011. *My Access* will provide you with a new user friendly interface to access all your insurance applications. Please contact your relationship manager if you have any questions.

New Clients for June 2011

- WFG Investments – IBD 6014

Stay Connected with Insurance & Retirement Services

We continue to look for ways to keep our customers and the industry connected to news and information related to our business. If you are a twitter user please be sure to follow us at www.twitter.com/dtccinsurance. We also have created a LinkedIn group that can be found here. Simply request to join the group. We thank you for your continued support.

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.



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