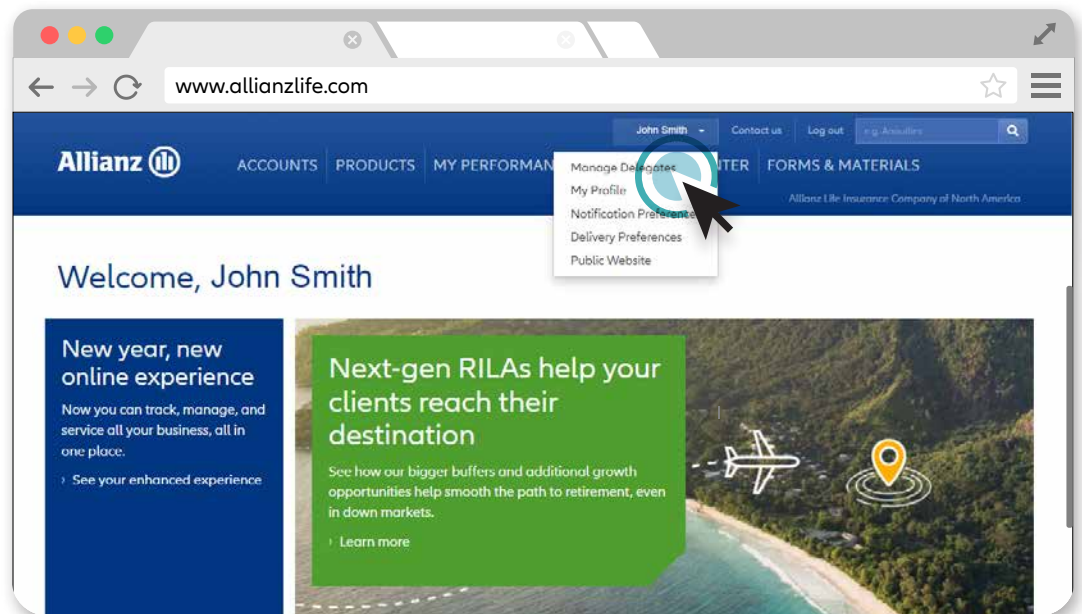


Delegate access guide

Please watch this [instructional video](#) and refer to these screen shots for step-by-step instructions.

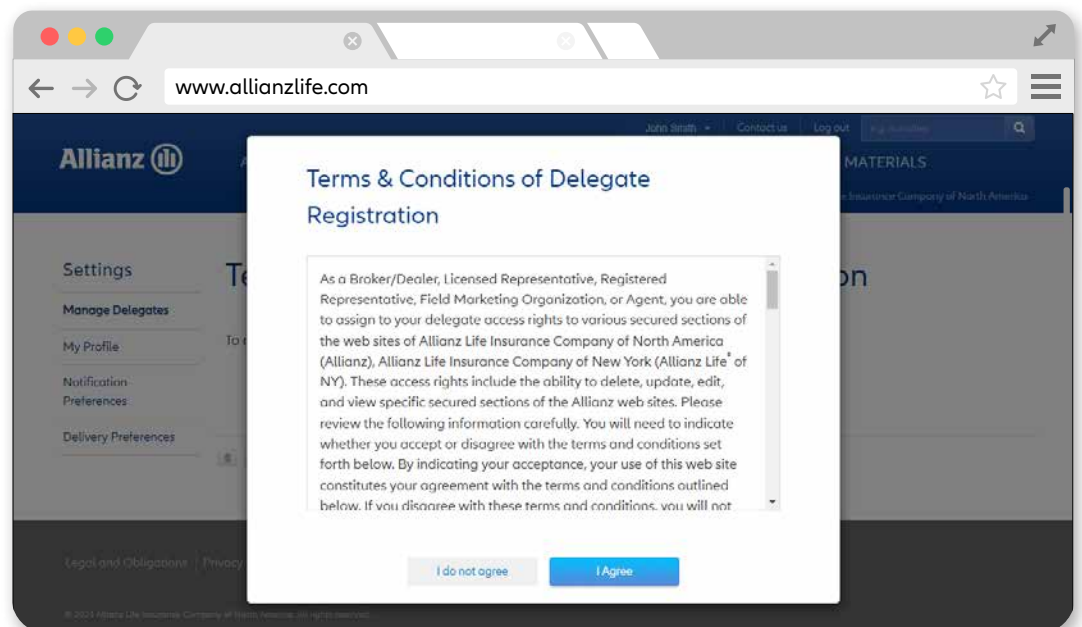
1

From the home screen on the Allianz secured website, navigate to your name in the upper blue banner to the left of **Contact us** and click on the down arrow and select **Manage Delegates**.



2

Read and agree to the **Terms & Conditions of Delegate Registration**.

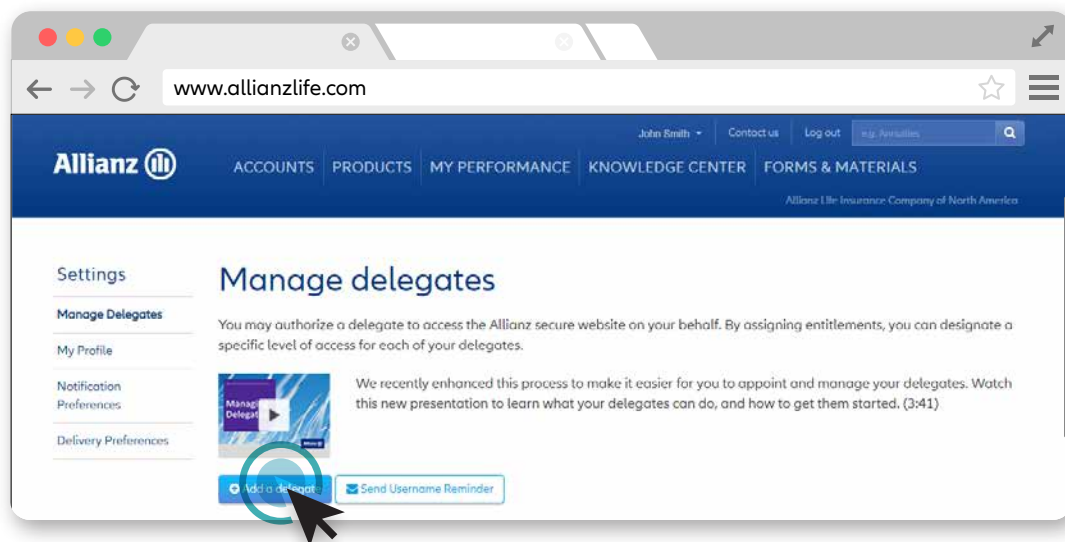


Product and feature availability may vary by state and broker/dealer.

M-8914 (1/2025) For financial professional use only – not for use with the public.

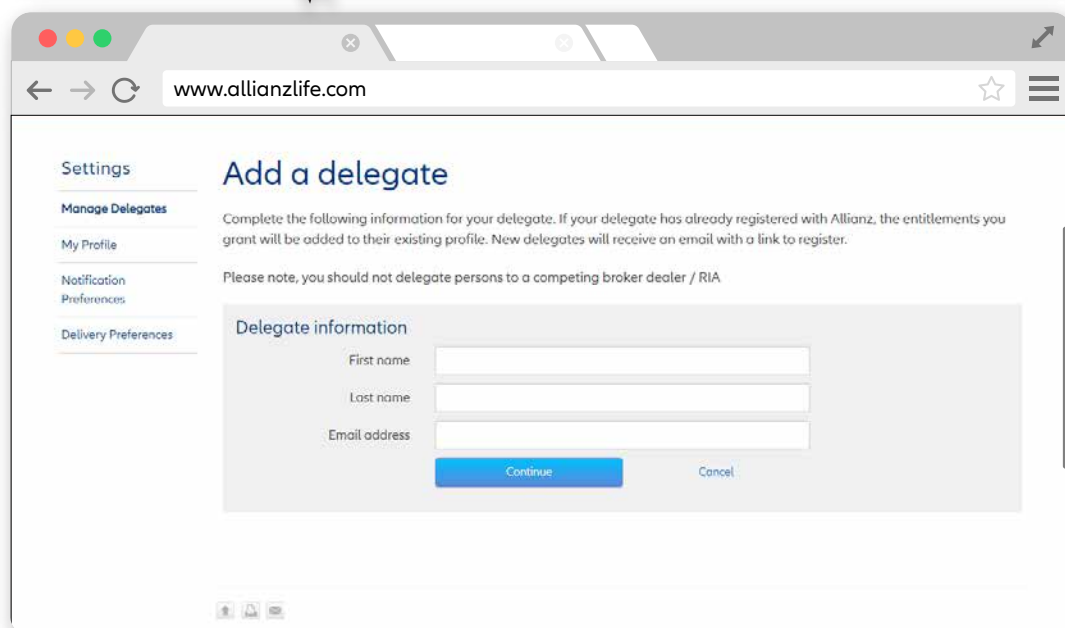
3

From the **Manage delegates** page, select **+Add a delegate** highlighted in blue.



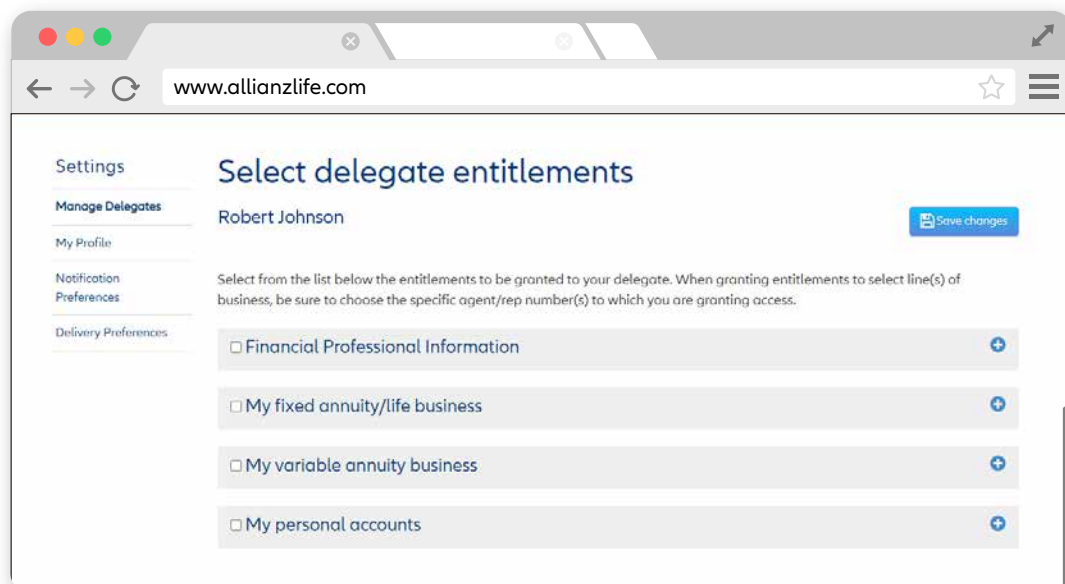
4

From the **Add a delegate** page, complete the fields with your delegate's first name, last name, and email address. If your delegate has already registered with Allianz, the entitlements you grant will be added to their existing profile. If your delegate is new, they will receive an email with a link to register.



5

From the **Select delegate entitlements** page, select the entitlement to be granted to your delegate. If you are granting entitlements to select lines of business, be sure to choose the specific agent/rep number(s) you are granting access to.



Delegate access guide *continued ...*

6

Once you select your delegate entitlements, additional fields will display so you can customize your delegate's entitlements/access.

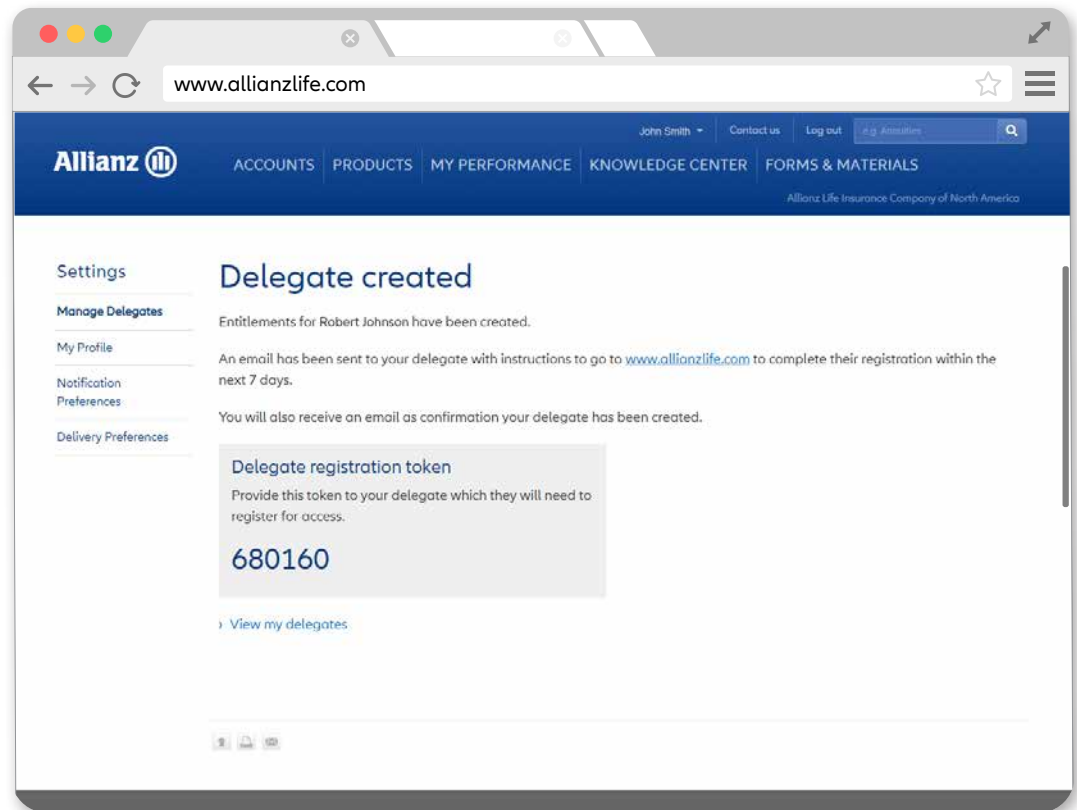
The screenshot shows the Allianz Life website interface. The top navigation bar includes the Allianz logo and links for ACCOUNTS, PRODUCTS, MY PERFORMANCE, KNOWLEDGE CENTER, and FORMS & MATERIALS. The user is logged in as John Smith. The main content area is titled 'Select delegate entitlements' for Robert Johnson. A 'Save changes' button is visible. The page instructs the user to select entitlements from a list. Two sections are shown: 'Financial Professional Information' and 'My fixed annuity/life business'. The 'Financial Professional Information' section has a 'Select all entitlements' checkbox and two options: 'Change Address Information' and 'Change Payment Information'. The 'My fixed annuity/life business' section has a 'Select agent number(s) for delegate to access' dropdown menu, currently showing 'No agent number(s) selected', and a 'Future agent numbers' section with a 'Grant access to all future agent numbers' checkbox.

If you select a specific line of business to grant delegate access to, you will be prompted to select from a dropdown the specific agent/rep number you are granting delegate access to.

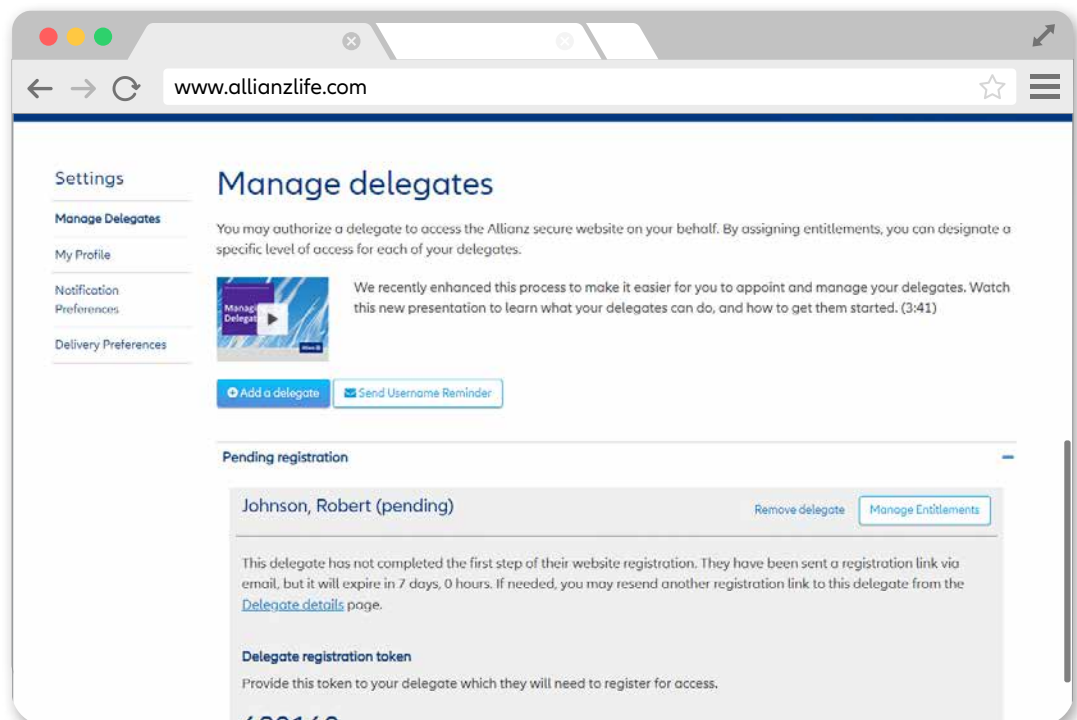
This screenshot shows the 'My fixed annuity/life business' section of the 'Select delegate entitlements' page. The 'Select agent number(s) for delegate to access' dropdown menu is open, displaying a list of agent numbers. The list includes 'ABC COMPANY, LLC' and 'XYZ COMPANY, LLC'. The 'Future agent numbers' section is also visible, with a 'Grant access to all future agent numbers' checkbox. The 'Select all entitlements' checkbox is also present.

7

Once you have selected entitlements, your delegate and their entitlements will be created. Your delegate will receive an email directing them to www.allianzlife.com to complete their registration within the next seven days. You will receive an email confirmation that your delegate has been created. You will also receive a delegate registration token code that you must provide to your delegate, as they will need the token code to register for access.



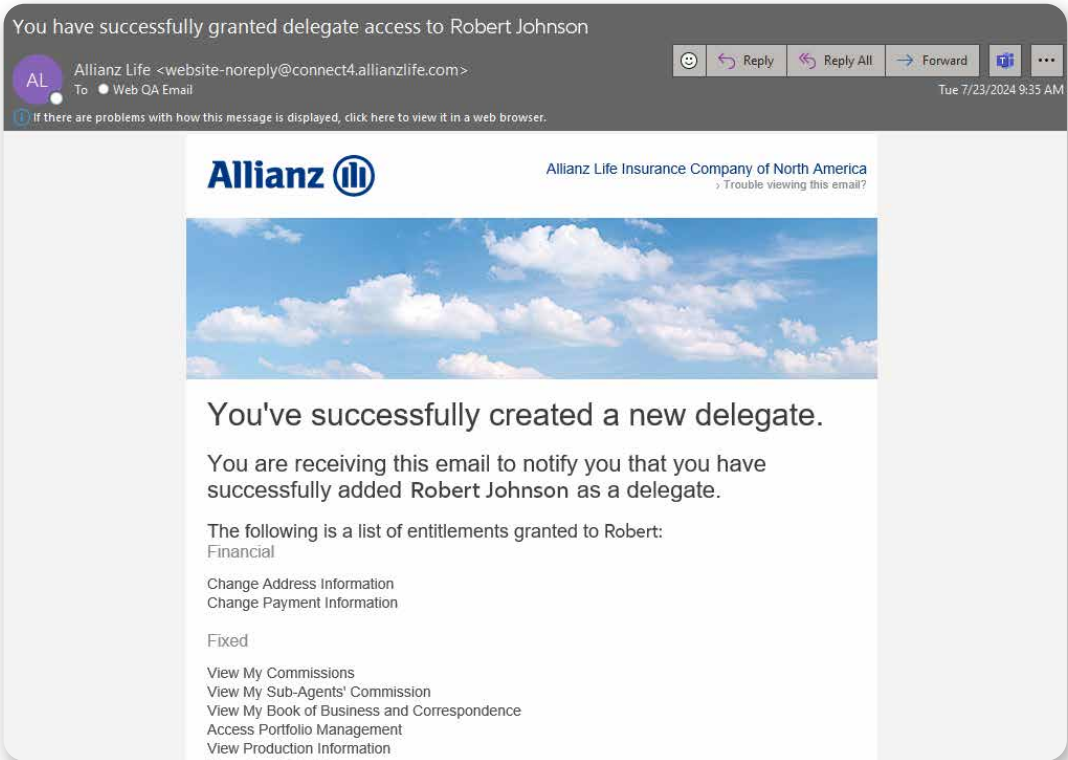
In this step you can elect to watch a short video on managing delegates. In addition, this is where you will see your pending delegates and the token code you will need to provide to your delegate. You can also resend the registration link, remove delegates, and/or manage entitlements from this page.



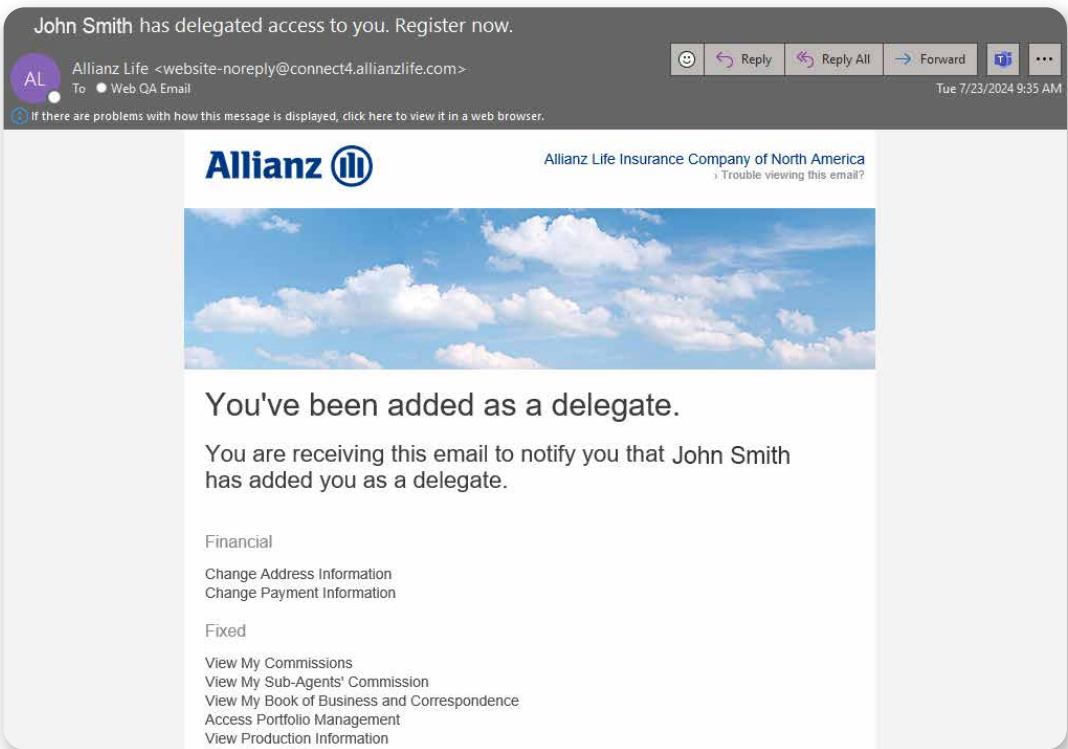
Delegate access guide *continued ...*

8

You will receive an email once you've successfully created a new delegate. This email will include the name of your delegate and the entitlements you granted.

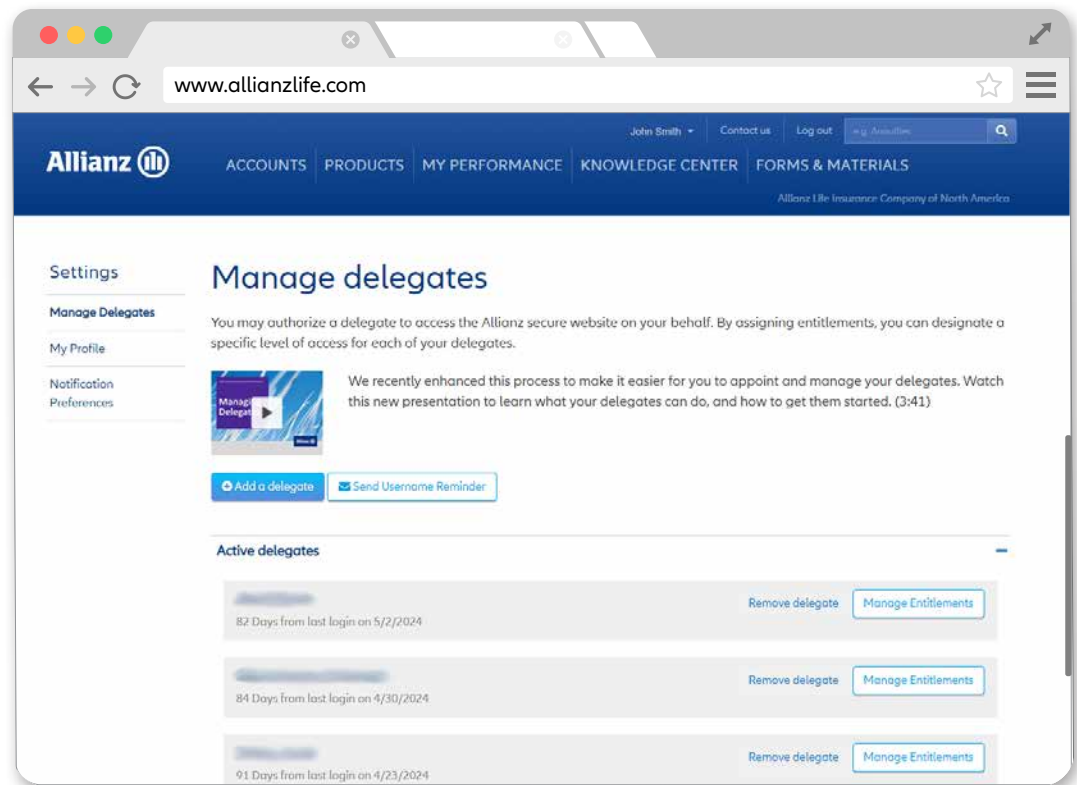


Your delegate will receive an email confirming that they have been added as a delegate and the entitlements they have been granted.



9

In order to manage your delegates and their entitlements, navigate back to the home page on the secure Allianz website and select the down arrow next to your name to the left of **Contact us** and select **Manage delegates**. From this screen you can watch the managing delegates video, add new delegates, remove existing delegates, and/or manage your delegates' entitlements.



Agencies, FMOs, and AFMOs will register using the principal individual's information:

- If a financial professional is contracted through an agency and they are contracted as the principal of that agency, the producer will register for website access as normal using the agent's name, date of birth, and SSN. Registration will recognize that the individual is also the principal of the agency, and agency information will automatically be attached to the producer's login.
- Similarly, an FMO or AFMO is contracted with an individual listed as the principal for the entity. To set up website access, the principal would register as normal using the principal's name, date of birth, and SSN. Registration will recognize that they are the principal of the FMO or AFMO, and access is created accordingly.

Additional information:

- Trustee must call in to 800-950-1962 to request registration to their trust-owned policies. Once registered, the Trustee will access their trust-owned policies, associated with the trust TIN via Manage Delegates.
- Clients, Agents, FMO, AFMOs, and B/Ds have the ability to create delegate access.
- There are certain ownership types that cannot register or have access to Allianzlife.com – for example: KaiZen, Foreign National policies (due to no SSN), Beneficiaries, or Power of Attorney. Some LLC- or corporation-owned policies may have access; however, this is reviewed/approved on a case-by-case basis.
- Please review web registration guide (Register your Allianz account online – CSI-456).