Annuity Pending Business Summary Report

Quick reference guide
On-demand annuity client data when you need it most

Take your expertise and contract ownership to the next level with our online view of your pending annuity business.¹

With the Annuity Pending Business Summary Report, you’ll spend less time gathering contract details and more time growing your business.

This real-time, mobile-friendly tracker allows you to:
• View up-to-date information on all your pending annuity business — anytime, anywhere
• Log in from any desktop, tablet or mobile device — no need to download an app
• Sort, filter and organize your contracts however you want

Getting started is easy — here’s how
2. Under the My Business tab, select “Annuity Pending Business” under the “Business Management” header.

¹ Single-premium immediate annuities (SPIAs) are not included on the Annuity Pending Report.
Summary Page
This is the initial page where a list of your pending annuity contracts are summarized.

Sorting and filtering
Customize your view based on criteria that’s most relevant to you. You can sort or filter by:

- **Contracts by category quick filters**: Narrow down the displayed contracts based on their current status in the business cycle
- **Advanced filtering**: Search and filter results by contract number, owner name, annuitant name, application sign date range, or next follow-up date range
- **Sort by**: Sort results by many different data points in ascending or descending order

Notecards: Each contract is displayed as its own notecard with a snapshot of high-level client information

Simply click on a notecard to view more detailed client information.

Export to Excel: Select this option to export pending contracts that meet any applied filtering

Download follow-up list: Select this option to export all follow-ups and the last note related to contracts that meet any applied filtering
Details Page

Once a user has clicked on a contract from the Summary Page, a new tab opens and the selected pending contract has summary data at the top, and the “Outstanding follow-ups” and the “Closed follow-ups” are provided.

**Outstanding follow-ups:**
Here you’ll find the follow-up items that are still open and outstanding for the contract, as well as the most recent note that provides details about the item.

**Respond:** This outstanding item has a follow-up requirement. You’ll need to review and respond to the outstanding item.

**Under review:** This message indicates that Nationwide has received a comment and/or document upload and is reviewing.

**No action is needed at this time from you.**

**Closed follow-ups:** View this section to see a history of resolved follow-up items.
At Nationwide, we are committed to providing you with resources that empower you to perform at your best. Visit NationwideFinancial.com to get started today.