Track My Apps

A new business tracker for retirement applications

About Track My Apps

Track My Apps is a unique and simple online tool that will help you follow the progress of your new business retirement applications from start to finish, in just a few simple clicks.

How can Track My Apps help your business?

- All the information you need in one place: it combines the status of your new business applications with a feed from Origo Options, so that you can track the progress of your applications and the transfer of funds
- It's quick and easy to use: from a simple summary page to more detail on each application

Accessing Track My Apps

To access **Track My Apps**, first make sure you're registered with our Adviser site at: **legalandgeneral.com/adviser/annuities/quoting-and-portals/#getting-started**

Once registered, just **log in** and follow the instructions.

Log in to Track My Apps >

Information you'll be able to see

Track My Apps captures the progress of a new business application from when it's loaded onto our system.

It will show:

- When funds are requested, sent and received via Origo Options
- When an illustration has been issued following receipt of all funds
- When an application has been put in force and the policy start date

It will also show the progress of each new business funds transfer, allowing you to check:

- When a transfer request was made by Legal & General
- When it's due to be received
- If there is a delay and why
- When the funds have been sent
- How much has been sent and the method (CHAPS, BACS or cheque)
- When the funds have been received by Legal & General

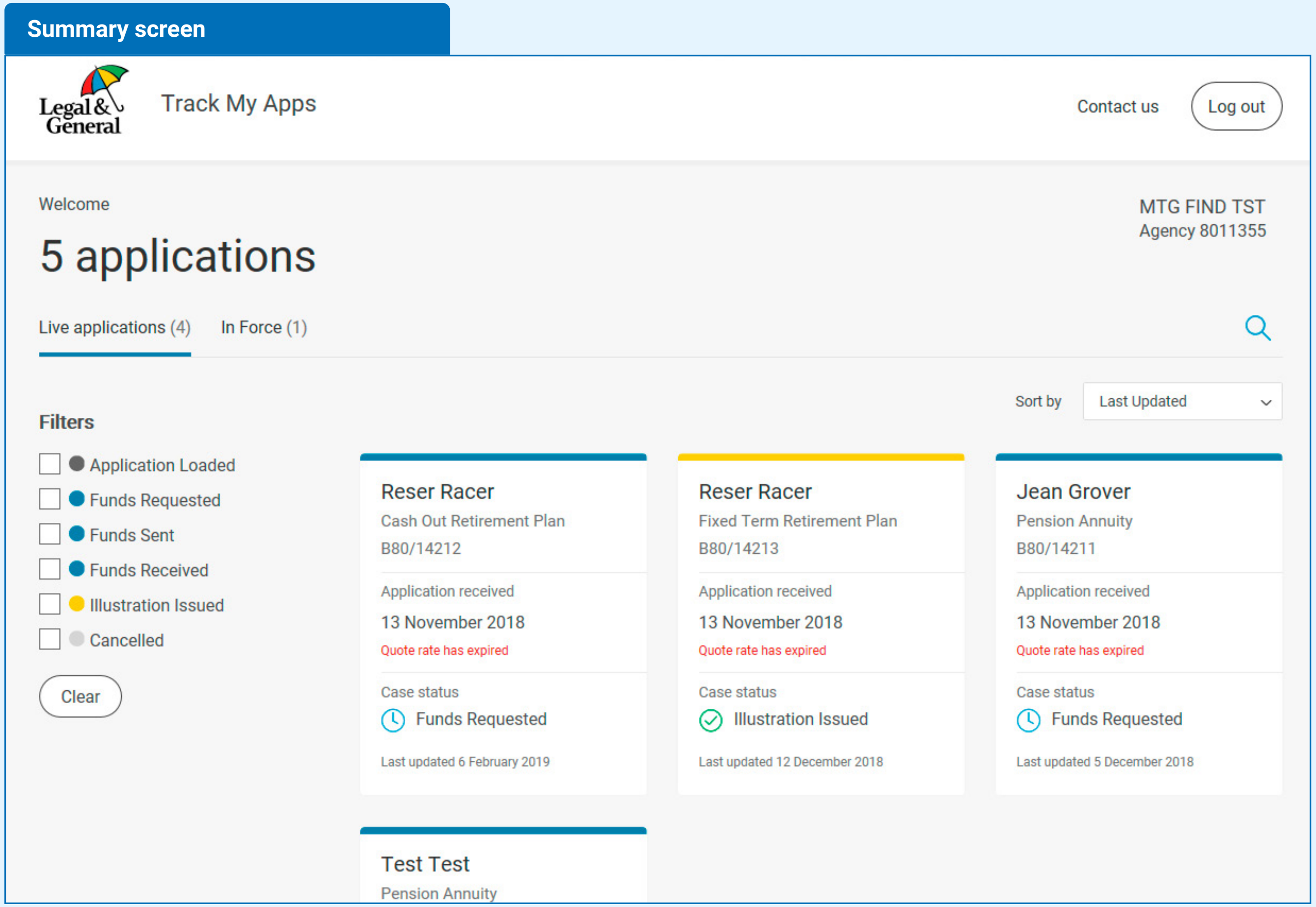
Once all funds have been received, **Track My Apps** will confirm when we have issued an illustration of the amount your client will receive.

Plus, when an application has gone live or has been cancelled, it will continue to be displayed for 28 days, after which it will be removed from **Track My Apps**. This allows in-progress applications to be quickly identified, and keeps the focus of Track My Apps on new business.

Summary view

When you log in, the summary page allows you to immediately see if there have been any updates with your applications.

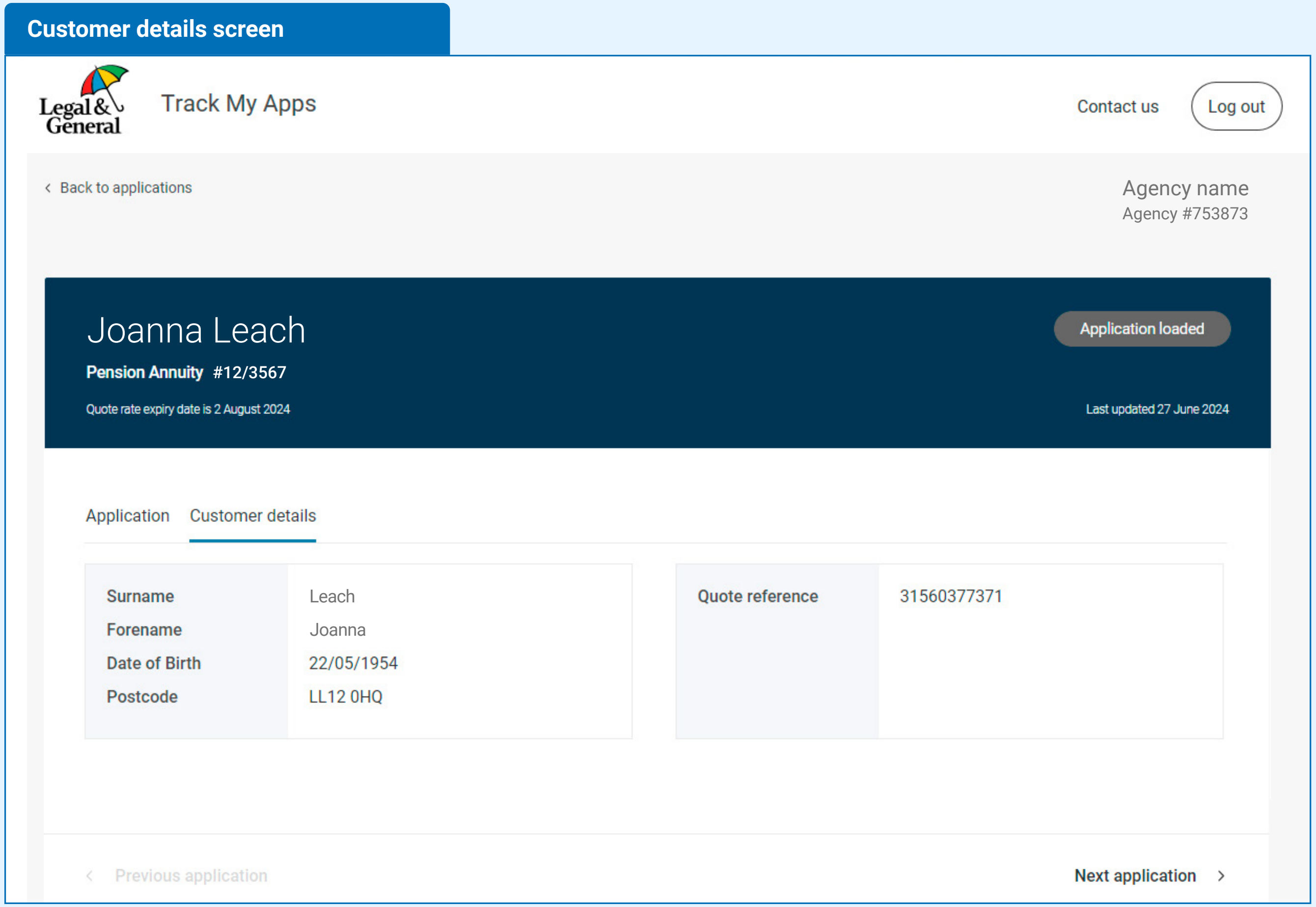
It shows all your applications listed in order of those that were updated most recently, alongside the expiry date for each annuity quote on your applications.



Search, sort and filter

Identify and organise your applications on the summary page by:

- Searching for individual applications
- Sorting – for example, by received date or quotation expiry date
- Filtering your applications based on the stage of their progression
- Viewing your in-force applications, via a separate tab, for up to 28 days after they've gone live

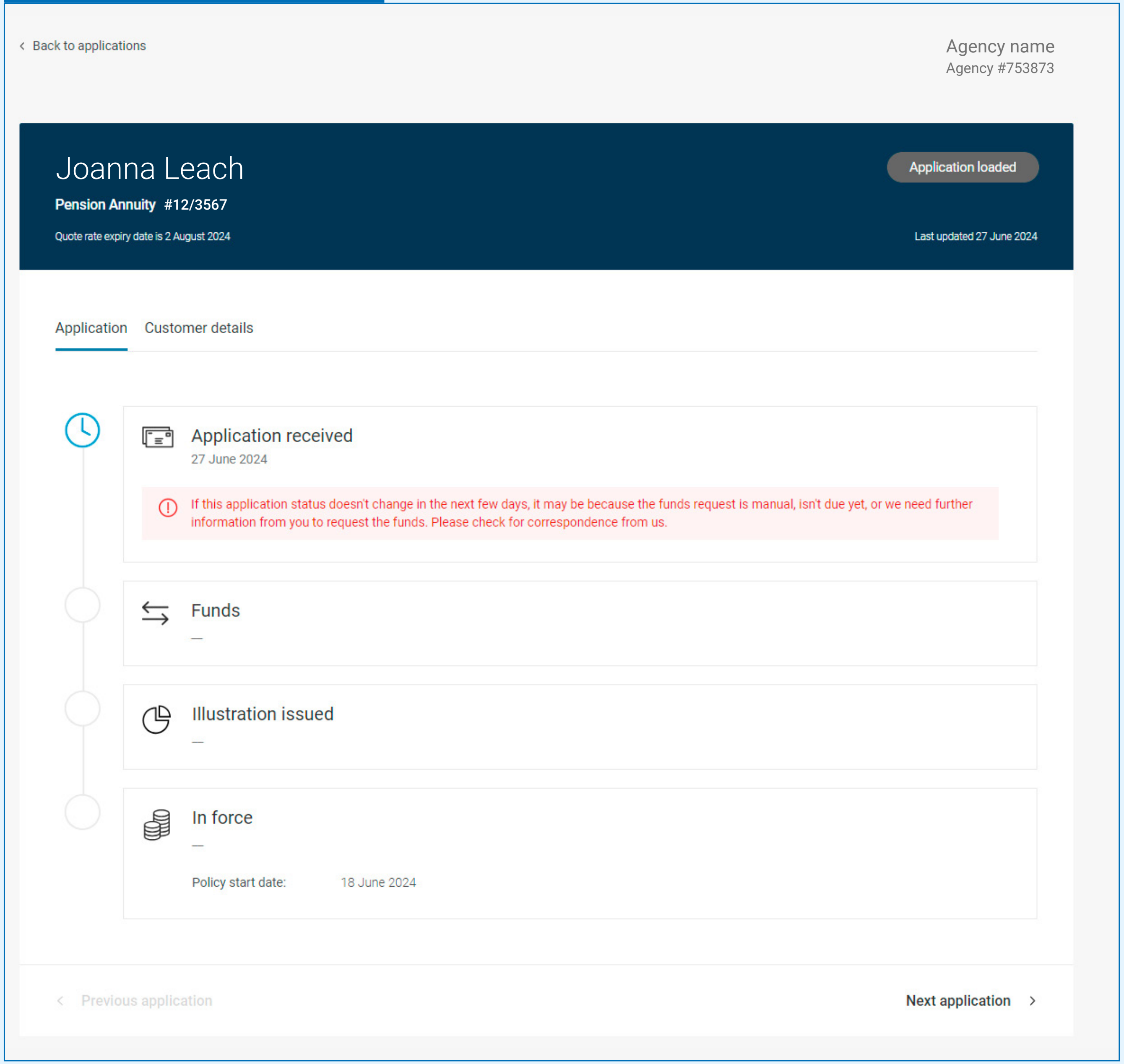


Application detail

Detailed progress of an application can be found by simply clicking on the relevant client card.

- View the progress of all the applications under your agency number plus details about the fund amounts transferred.
- Where you have applications for more than one agency, please register for access for each agency number and log in under each specific agency separately.

Customer application detail screen



How up to date is the information?

Track My Apps takes information from our systems and Origo Options, which provides details of the progress of the funds transfer.

- A new application will be displayed on **Track My Apps**, the next working day after it has been loaded onto our system.
- Our system updates, such as when an illustration has been issued or when the application has been put in force or cancelled, will also show the following working day.
- Funds transfer data is updated by Origo Options every two hours from 6am to 6pm Monday to Saturday, and every six hours outside these times.

What products can I track?

You can track the progress of new business applications for:

Pension Annuity

Fixed Term Retirement Plan

Cash-Out Retirement Plan

What can't I track?

If a funds transfer request is not managed by Origo Options, then it cannot be displayed on Track My Apps.

If the entire transaction is handled manually, the application will remain on the 'Application Loaded' stage on **Track My Apps** until we have received all of the funds, the illustration is issued, and the application is put in force.

For these applications, please contact us for updates using the contact details at the end of this guide.

Track My Apps cannot provide detailed information about any outstanding information we need from you to progress a new business application.

If an application remains as 'Application Loaded' or 'Illustration Issued' when you would expect it to proceed, please check your correspondence from us.

Where can I find help?

If you need help, or would like to find out how Track My Apps can support you, please call us on:

0345 765 4465

Or visit our website:

legalandgeneral.com/adviser/annuities/track-my-apps/

Call charges will vary. Calls may be recorded and monitored. Lines are open Monday to Friday, 9am to 5pm.

If you're contacting us by email, please remember not to send any personal, financial or banking information, because email is not a secure method of communication.

Meet our team

As one of the biggest financial services companies in the UK, we have a highly efficient team to ensure the smooth running of our retirement business.

Our distribution team specialise in helping you to grow your business through our range of retirement solutions.

Visit our website to meet our team:
legalandgeneral.com/adviser/annuities/distribution-team/

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Legal & General