

Portal Self-Registration Instructions



You may access The Standard's online services by simply adding the ones that best fit your needs as a financial professional. This reference guide describes how to log in and how to manage your profile to add new services.

How to Log In and Access Services via The Standard's Online Portal

To log in and access services at The Standard, the following steps apply.

- 1 Go to www.standard.com and click **Log In** (located near the upper right hand corner of the Home page).
- 2 On the **Log In** page, enter your **User name** and **Password**, then click the **Log In** button. This will take you to the **My Home** page where you will see the services you currently have with The Standard.

Note: If you don't see a service you were expecting, you may update your profile to add a service or contact The Standard for assistance. See [How to Manage Your Profile](#) below for more details.

How to Manage Your Profile to Add Services

You may add services to your account at any time by managing your account profile.

- 1 After logging in and going to the **My Home** page, click the **Update your profile** or **Manage Profile** link.
- 2 A list of services that you have access to will appear on the **Manage Profile** page. To add a new service, select the **Services for financial professionals or firms** option under **What would you like to access?** This will permit you to choose one or more of the services available.
- 3 Under **Choose Services**, select one of the following options:
 - **Individual Annuity and IDI Policy Details.** This service permits you to look up in-force and pending individual annuity, IDI and guarantee issue (GI) policies.
 - **IDI Illustration Software.** This option allows you to use the web-based software to generate illustrations of The Standard's IDI products.
 - **Commission Details.** If your producer or firm has received a commission statement from The Standard, you may review compensation details and payment options with this service.
- 4 Upon selecting the **IDI Illustration Software** option, you will be prompted to enter the **Access Code** issued to your firm.

If you also choose the **Commissions Detail** service, you will be prompted to enter the **Amount of last commission payment from The Standard** and the **Period ending date of last commission payment**.

If you select access to **Individual Annuity and IDI Policy Details**, you will not be prompted for any other information.

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- ⑤ Once you have entered the required information for the services you've selected, click the **Update Profile** button to go to the **Log In** page. Once you've logged back in, you will then be able to access the new service options.
- ⑥ To generate an IDI illustration for a prospect, click the **Continue to Illustration Software** link.

To access in-force client data and details of pending new business on existing insurance policies, click **Continue to Policy Inquiry**.

To view compensation statements and review payment options for your producer or firm, click **View Commissions**.