DELAWARE LIFE®

Delaware Life Online Account Access

Quick Reference - Customers

Delaware Life Online Account Access

Quick Reference

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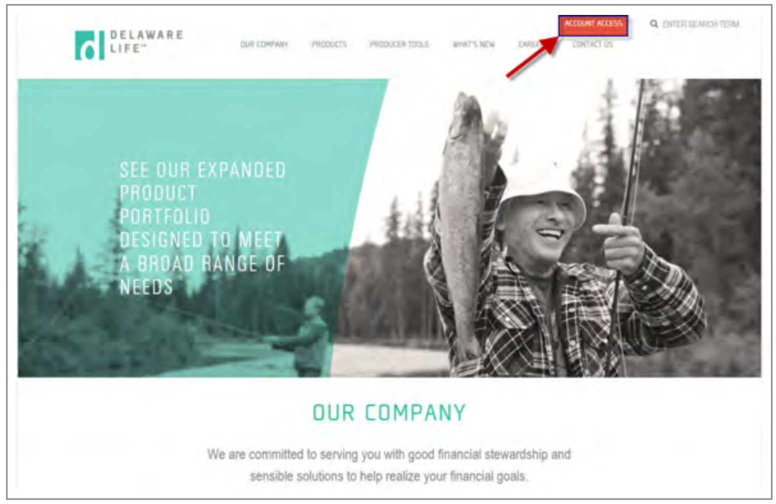
Registering on the Delaware Life Account Access Website

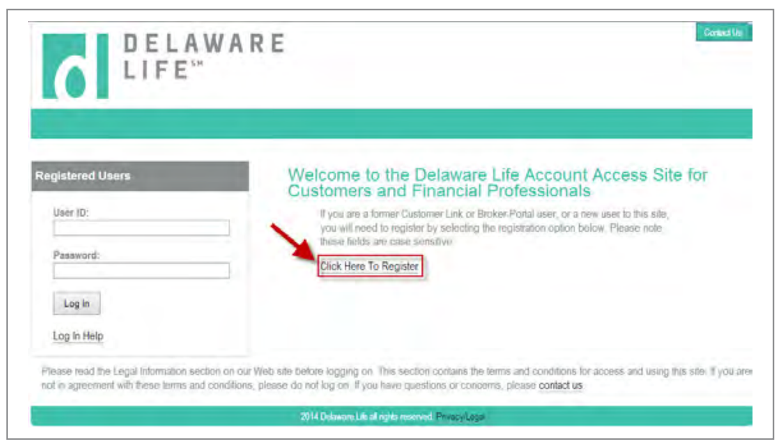
New Users:

1. Open the Delaware Life Website at https://www.delawarelife.com/.

2. To access account information, click on the red **ACCOUNT ACCESS** link on the top right of the Delaware Life Website main page. This will open the Welcome Page to the Account Access site.



3. First-time users must register for the Account Access Site. Click on the **Click Here to Register** link in the middle of the page. This will open the Create User Account page.



4. To **Register for a User Account**, fill in the fields on this page.

NOTE: Required fields are indicated with an *

5. Once you have filled in the required fields, click on the **Next** button at the bottom of the page.

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You will now be directed to a screen to set up your Account Profile.

6. Enter the following fields as indicated.

   NOTE: Required fields are indicated with an *

7. Click on **Next** at the bottom of the screen to continue the registration process.

   If you need to change a field on the previous page, click on **Back** at the bottom of the screen.

8. On the next page, select the link that describes your role.

9. Customers/Consumers are required to enter their contract number.

10. Once you have entered the Contract #, you can click on the **Create Account** button.

11. An email will be generated and sent to you, containing:
    - User ID
    - A one-time-use Temporary Password (see Note).

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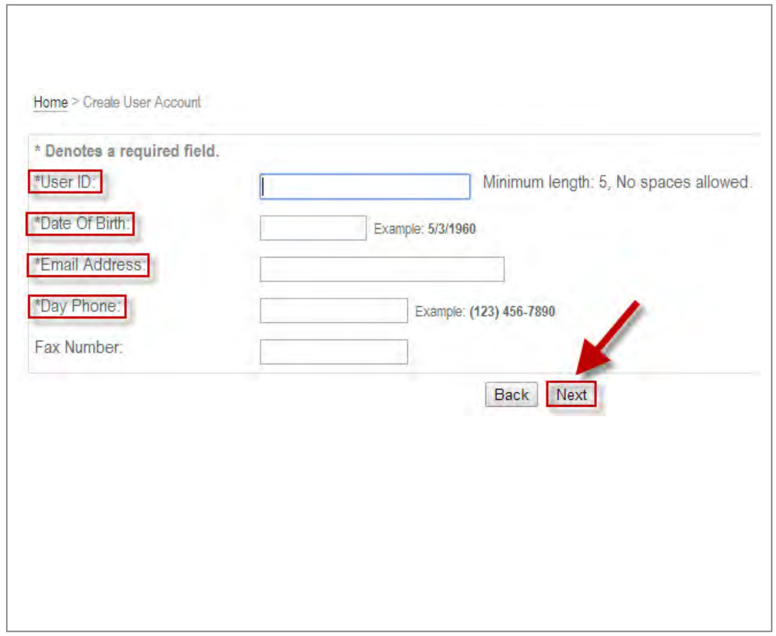

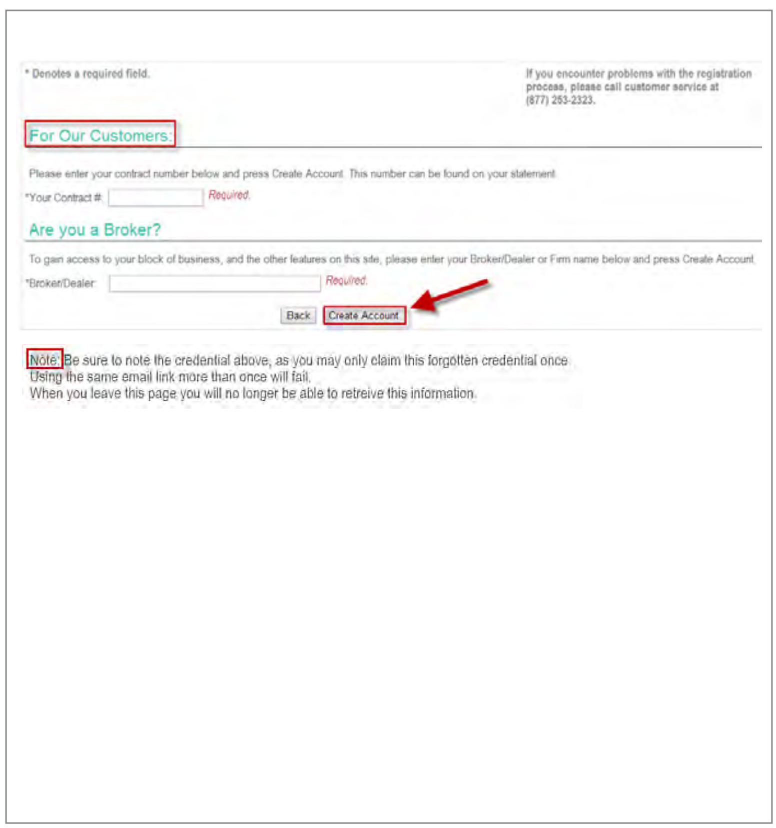

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Logging In to the Delaware Account Access Website

Returning Users:

Once you have registered, any subsequent visit requires that you enter your User ID and Password.

Click on the **Log In** button.

If you cannot remember your User ID or Password, click on **Log In Help**.

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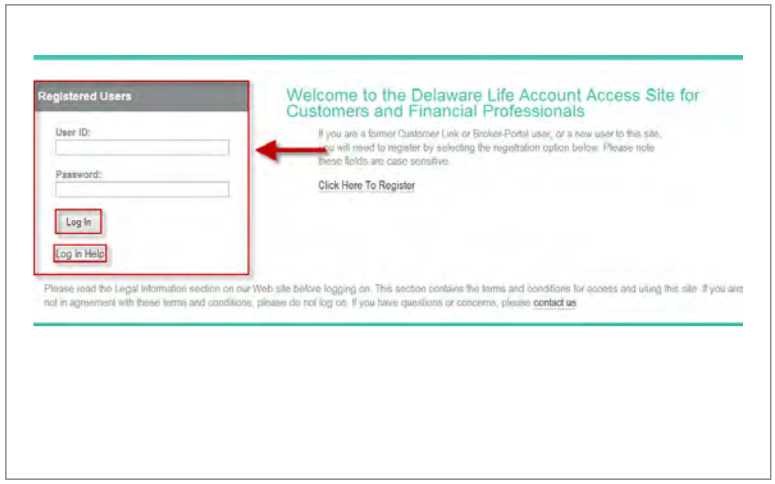

Log In Help

Clicking on **Log In Help** will take you to a screen where you are able to request your User ID or have a new temporary Password sent to you.

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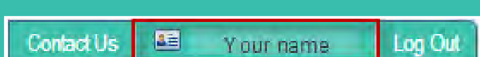
Updating Your Personal Profile or Changing Your Password

To update your **Personal Profile** or change your Password, click on your name in the upper right-hand corner of each screen.



This will open the **Personal Profile** page. Fill in the fields that need to be changed and click on the **Update Profile** or **Update Password** button.

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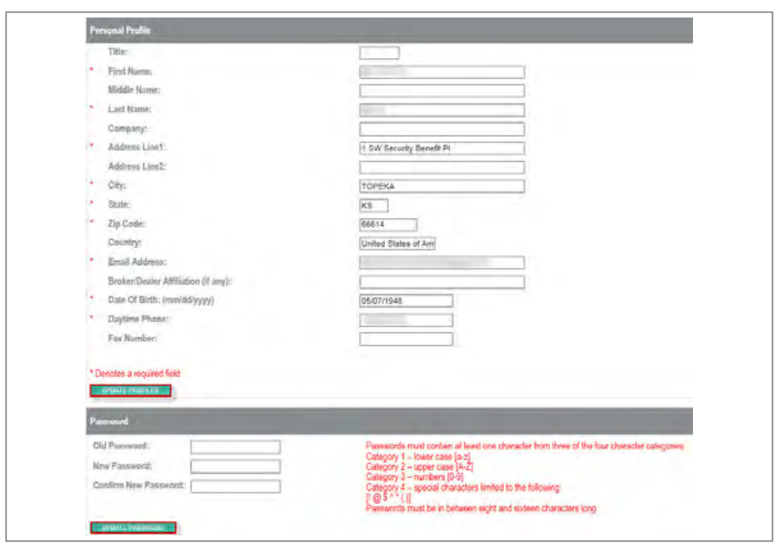

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Accessing Account Information

Returning Users:

Enter your User ID and Password.

Click on the **Log In** button. This will open the **My Accounts** section of the Website.

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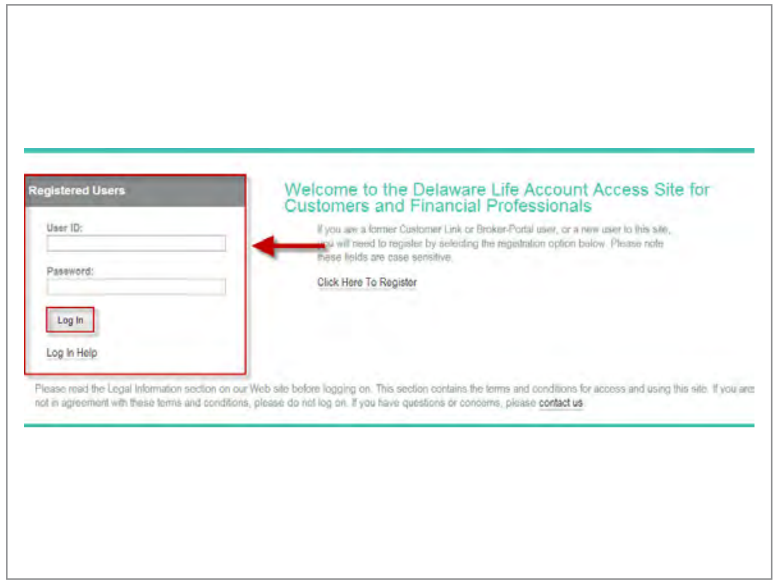

My Accounts

The **My Accounts** section provides information regarding the contract. It is divided into tabs including:

- Values
- People
- Transaction History
- Tax Forms
- Documents

Every screen in the **My Accounts** section will include basic **Contract/Policy Information** for the contract.

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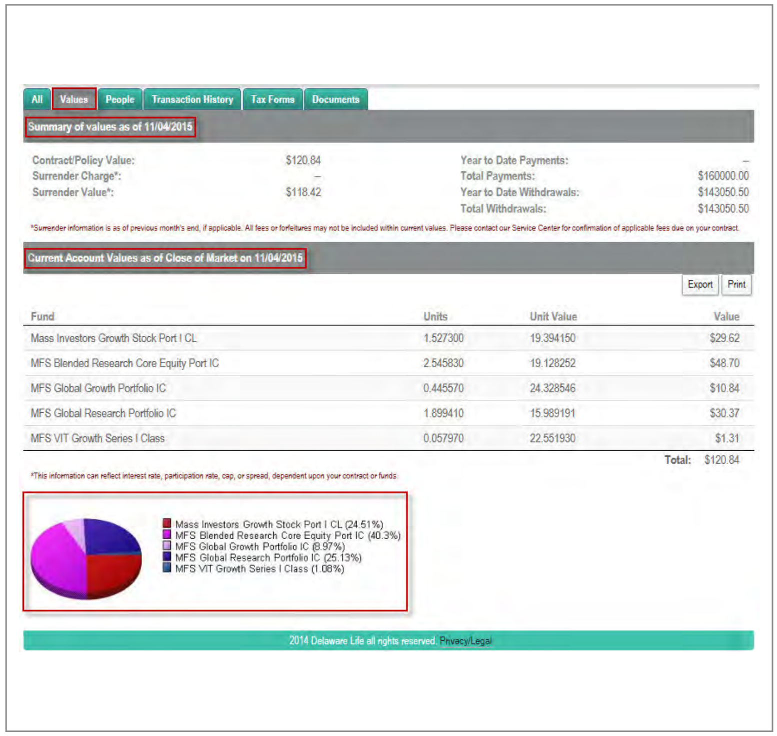
Values Tab

The **Values** tab provides a summary of the contract values relating to the contract as at the end of business of the previous day. Included under the summary of values are:

- Contract Value
- Surrender Charges (if applicable)
- Surrender Value (if applicable)
- Payments
- Withdrawals

At the bottom of the Values tab is a list of the funds that are applicable to the contract, as well as a graphical breakdown of funds.



Benefits Tab

The **Benefits** tab provides detailed information regarding your living benefit rider (if applicable).

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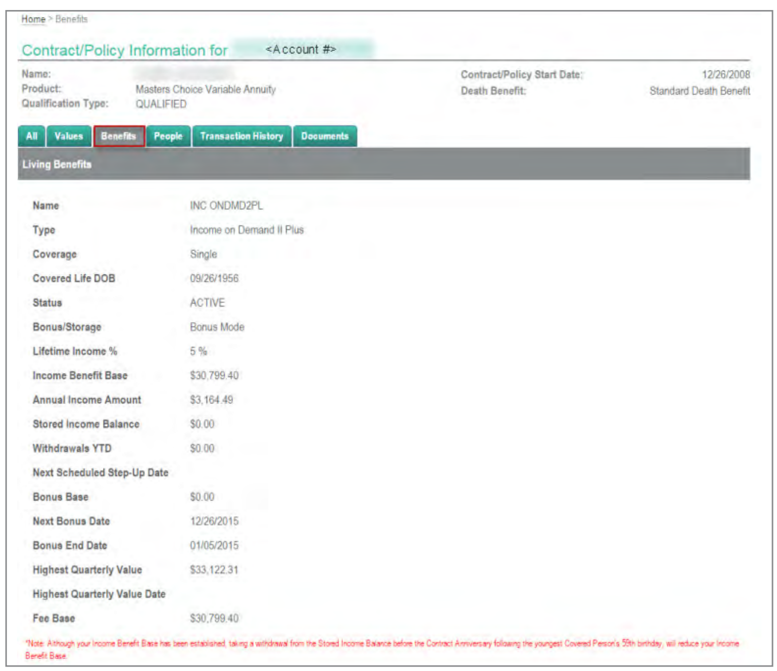

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People Tab

Included on the **People Information** screen is information about the owners and parties related to the contract. This includes:

- Owner
- Annuitant
- Primary Beneficiary
- Payee

The **People Information** screen also includes Agent Information for the Agent of Record on the contract.

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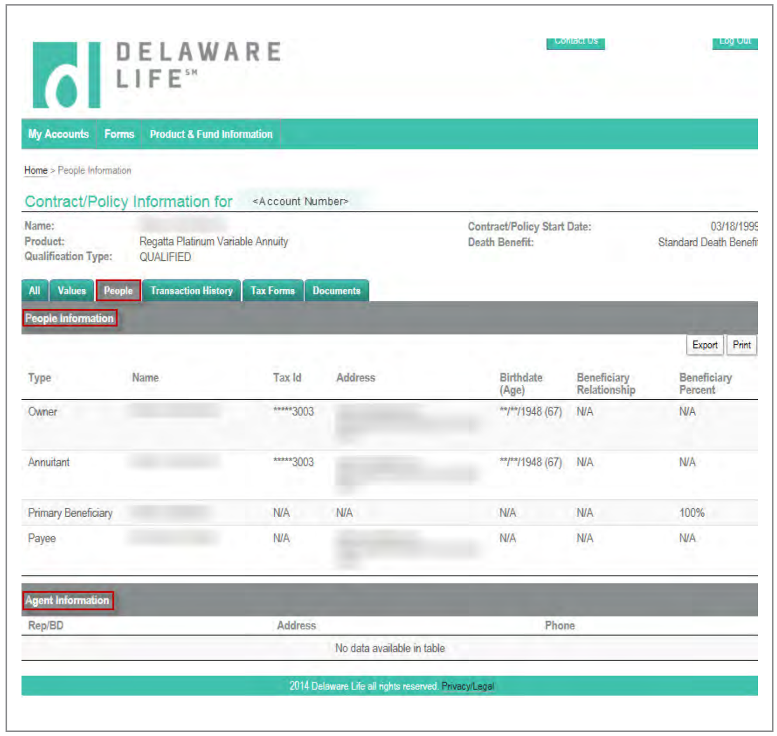

Transaction History Tab

The **Transaction History** tab provides information on recent transactions that have occurred on the contract.

To view additional transactions, click on the **Next** button at the lower right-hand of the page.

The transaction list can be sorted by the column heading or by using the Filter button on the gray bar, right side. The list can also be exported to Excel or printed using the buttons under the gray bar on the right side.

Fund-level information can be viewed at the transaction level by using the green + sign to the left of the Date column to expand the information displayed.

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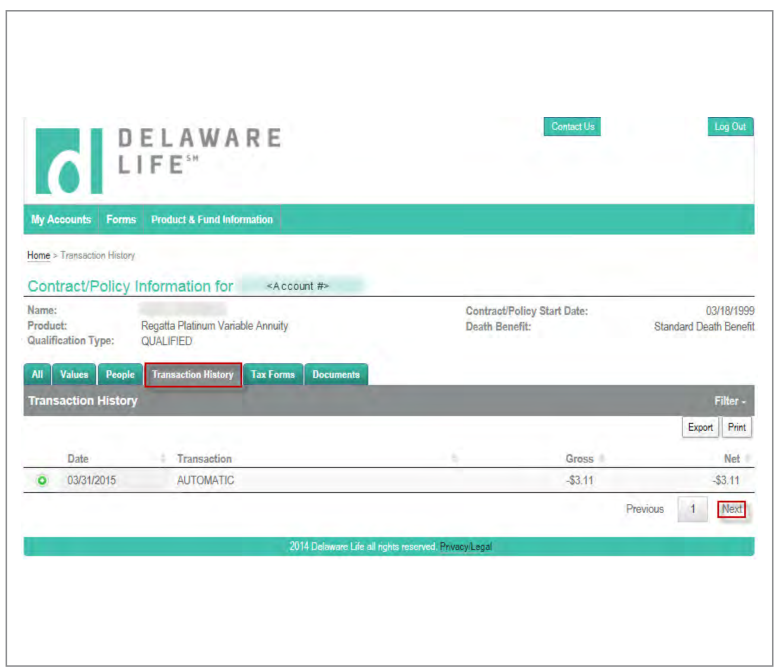

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Tax Forms Tab

The **Tax Forms** tab provides links to tax forms that have been issued for the contract in the previous year.

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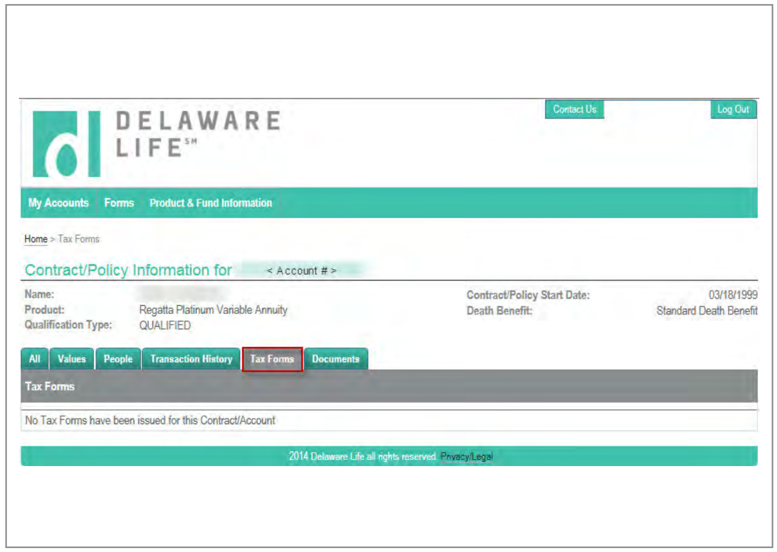

Documents Tab

The **Documents** tab contains the documents that pertain to the contract.

To open a document, click on the name of the document. The document will open in a separate window.

To view additional documents, click on the **Next** button at the lower right-hand of the page.

NOTE: If you are attempting to locate a document that does not appear on this page, please search by contract number and view the Documents tab for additional information.

The document list can be sorted by the column heading or by using the Filter button on the gray bar on the right-hand side.

A search box is also provided to find a specific document.

Multiple documents can be viewed in one PDF by using the check boxes to the left of the Document description.

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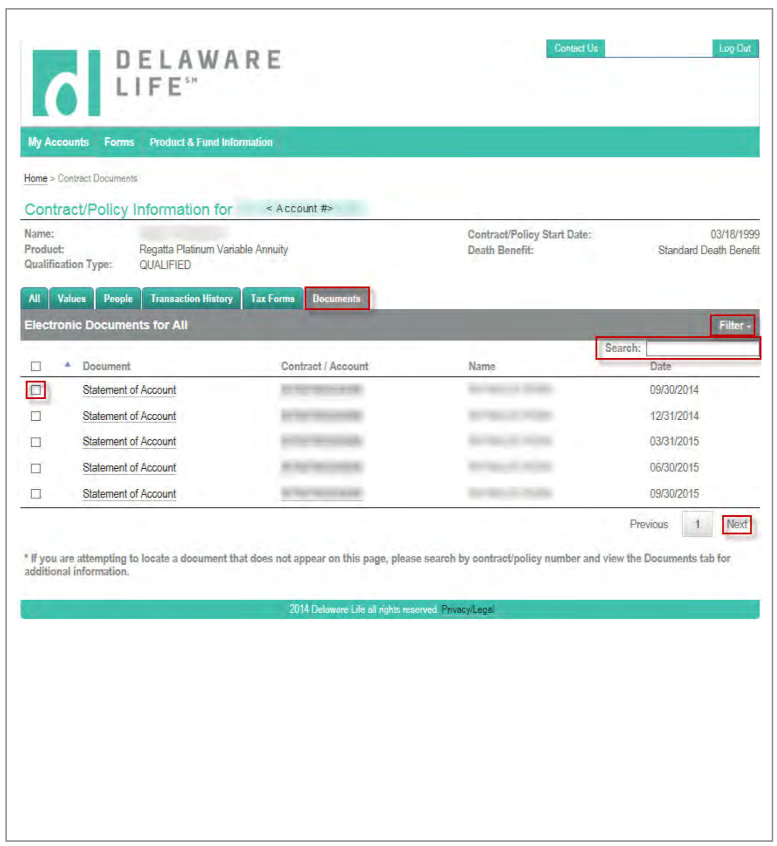

Forms

The **Forms** section of the Website allows you to access the most common forms required for transactions on the contract.

Forms that are accessible on the website, include:

- Annuity Forms
- Life Insurance Forms
- Pinnacle MYGA Forms

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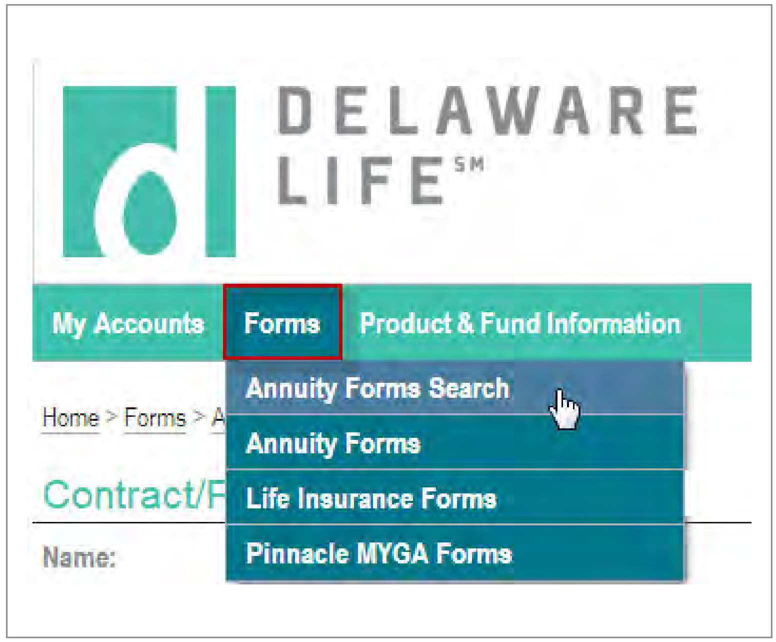

Annuity Forms Search

If you know the specific name or form number, you can use the **Forms Wizard** to access a form by entering the specific name or form number in the search box at the top of the page and then click OK.

If you do not know the specific name or form number, you can find the required form by:

1. Select the appropriate Transaction Type.
2. Select the Product Type.
3. Select the State.
4. Select the Product Name.

The form will open in a separate window.

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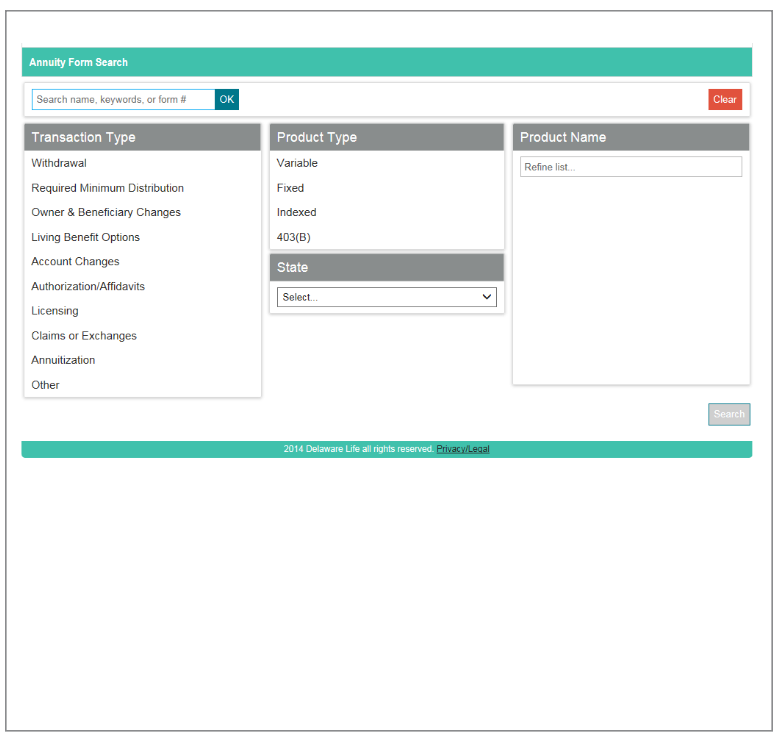

Product & Fund Information

The **Product & Fund Information** section of the Website provides you with additional information on your Variable Life and Annuity products.

Included in this information is the following:

- Product Prospectuses
- Fund Performance
- Additional Information
- Annual Reports

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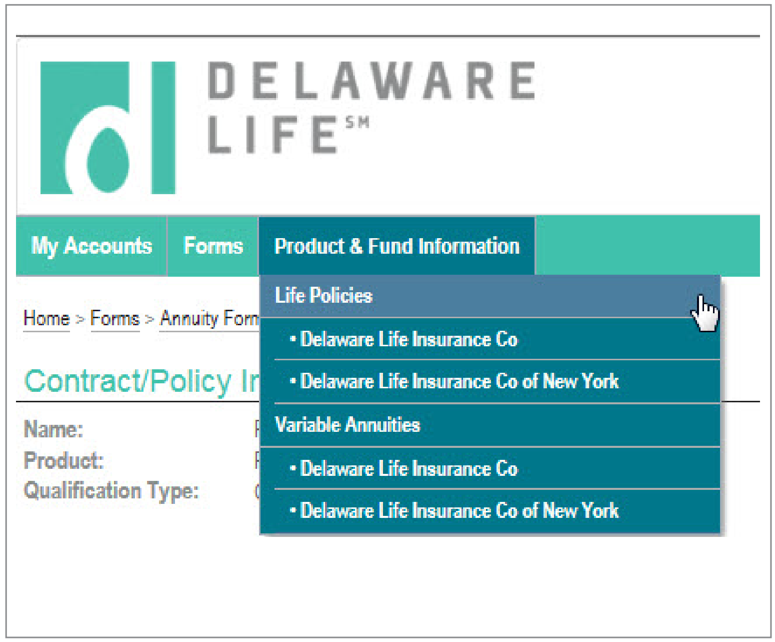
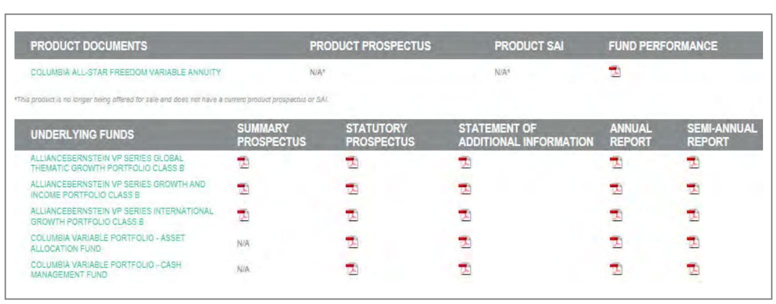


Accessing Product and Fund Information

To access the product and fund performance information, click on the **VIEW** button to the right of your particular product.

This will open a new window. Locate your product and click on the specific attachment you are looking for. The attachment will open in a separate window.



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