FIA Data Feeds in InvestmentHQ

FIA feeds will show in the following areas of InvestmentHQ

I. **Client Portal**
   a. Carrier Feeds - Active
      i. Allianz
      ii. Security Benefit
      iii. American Equity
      iv. Athene
      v. Nationwide
      vi. Symetra
      vii. Voya
      viii. Genworth
   b. Carrier Feeds - Pending – *This will be completed in 2019*
      i. Equitrust
      ii. Pacific Life

II. **Portfolio Audit**
   a. Carrier will show under Fund Family
   b. Market Value = Account Value
   c. Income Value (does not show with all carriers)
   d. Basis for NQ (does not show with all carriers)
   e. Effective Date is the most recent data update, not the policy effective date

III. **Reports**

Q & A

Q: Will annuities the client previously had with another advisor show up?

A: Only annuities written under AE are available to feed into the Client Portal.
Within Balance Sheets your clients can pull in annuities or other accounts not written under AE.

Q: Can an advisor turn this function off for their clients?

A: Yes, they can do this in Client Portal and turn off for their firm or per client
Settings > For Site Default (or Client) > Portfolio > Show Annuities > Off > Save

Q: Will FIA feeds show on the mobile app?

A: FIA feeds will show up in the InvestmentHQ Mobile App;
Surrender Charge & Income Value will not filter through on the app

Please reach out to your AE Wealth Management Team for additional questions and support @ 866.363.9595