



AMS
FINANCIAL
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RightBRIDGE®

WFG SALES DESK

PHONE: 770.934.7355

WWW.MYWFG.COM

WFG Rightbridge Report

To access, please go to <https://www.mywfg.com>

The screenshot displays the WFG Rightbridge Report website. At the top right, a red arrow points to a 'MENU' button, which is enclosed in a red rectangular box. The website header includes the WFG logo, 'MY WFG', 'MY BUSINESS', 'FINANCIAL - AMS01', a search icon, 'I WANT TO...', and a briefcase icon. The main banner features the text 'Regulation Best Interest Sales Process' and 'NEW TRAINING VIDEO AVAILABLE' with a '4 / 9' indicator. Below the banner, the 'SPOTLIGHT ON SUCCESS' section highlights 'ZACKARY RANCE' on his advancement to CEO. The 'NEWS' section lists several articles, including 'WFG News and Notables' and 'WFG Play Card: View the Archives'. The footer contains copyright information for 2021, World Financial Group, Inc., and links for 'Privacy Statement', 'Terms & Conditions', and 'Complaint Handling'. The bottom navigation bar includes icons and text for 'CREATE CONTACT', 'MY TEAM', 'MY PROFILE', and 'HELP'.

MENU

[Home](#)

[New Agent Hub](#)

[Events & Recognition](#) >

[Licensing & Appointments](#) >

[Recruiting & Selling](#)

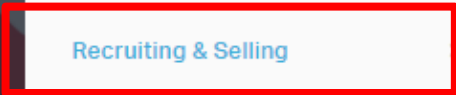
[Commissions & Reports](#) >

[Administration](#) >

[TFA](#) >

[Training Center](#)

[Log Out](#)



MENU

[Home](#)

[New Agent Hub](#)

[Events & Recognition](#) >

[Licensing & Appointments](#) >

[Recruiting & Selling](#) >

[Commissions & Reports](#) >

[Administration](#) >

[TFA](#) >

[Training Center](#)

[Log Out](#)

[Recruiting & Selling](#)

[Recruiting Tools](#) >

[Launch Registration](#)

[Team Tools](#) >

[Marketing Resources](#) >

[Sales Tools & Info](#) >

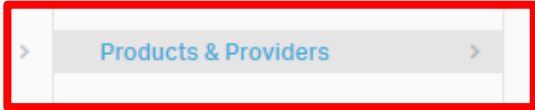
[Products & Providers](#) >

[Product Guide](#)

[Preferred Providers](#)

[Referral Providers](#)

[Sales Resources](#)



MENU

Home	Recruiting & Selling	Product Guide
New Agent Hub	Recruiting Tools >	Preferred Providers
Events & Recognition >	Launch Registration	Referral Providers
Licensing & Appointments >	Team Tools >	Sales Resources
Recruiting & Selling >	Marketing Resources >	
Commissions & Reports >	Sales Tools & Info >	
Administration >	Products & Providers >	
TFA >		
Training Center		
Log Out		



Sales Resources



- [Rightbridge](#) >
- [DocuSign Forms](#) >
- [PDF Forms Download](#) >



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Nationwide
Fixed Annuities &
Fixed Indexed Annuities



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AMS



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iGO



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Nationwide
Life Insurance



GO

Pacific Life



GO

Crump

NOTICE

You Are Now Leaving MyWFG.com

*The website you have selected is not maintained
by WFG.*

[Click here to continue](#)

[Close this window and return to your site](#)



Welcome, AMS FINANCIAL DIVISION LOG IN

RightBRIDGE[®]

Product Profiler

The RightBridge Product Profiler engine to determine the relevance of specific products for a customer's needs and objectives. The engine gathers information from the customer about their preference for income, time horizons, risk tolerance and guarantees. The engine then configures and filters the company's inventory of available products by product type to find which best meets the customer's objectives.



FINANCIAL DIVISION LOG IN

Home

New Case

Find Existing Case

Product Profiler

Annuity Wizard

FA Rates

FIA Rates

RILA Rates

Product Look Up

Life Insurance Wizard

Log Out

Product Profiler

Bridge Product Profiler uses a sales intelligence engine to determine the relevance of specific products for a customer's objectives. The application gathers key information from the customer about their preference for income, time horizons, and guarantees. The engine then configures and filters the company's inventory of available products by product and which best meets the customer's objectives.

Create a New Case

Select an Existing Case



RightBRIDGE

Annuity Wizard

The RightBridge® Annuity Wizard® uses a scoring engine to determine the relevance of specific annuities for an annuitant's needs and objectives. The application gathers key information from the annuitant about their preference for income, time horizons, risk tolerance and guarantees. The engine then configures and filters the company's inventory of available annuities and living benefit options by product type which meet the annuitant's objectives.



Create a New Case



Select an Existing Case

Enter all required fields* and 'Case Description' as Client Name and Current Date; e.g., John Smith 12.06.2021

Welcome, AMS FINANCIAL DIVISION LOG IN

Annuity Wizard → Search → Questionnaire

Client Information

First Name *

Last Name *

Case Description

Primary Owner/Annuitant Current Age *

Gender *

Male Female

State Of Issue *

Qualified Initial Premium *

Is the initial premium qualified money?

Yes No

Purchase Type *

Which scenario best describes this annuity purchase?

New policy Replace an existing annuity policy Add money to an existing policy

Annuity Purpose *

What scenario best describes this annuity purchase?

Lifetime Income is the priority Accumulation and Growth Enhanced Death Benefits

Select or Validate

Select 'Validate a proposed annuity', then select the carrier and product being applied for.

Select or Validate

The system can profile multiple needs and match them to products that may be suitable for the annuitant's needs. In addition to this, you can also validate a proposed annuity.

How would you like to proceed?

Select from available annuities Validate a proposed annuity

Covered Lives? *

Lifetime income features can cover one life (Single Life) or two lives (Joint Life). By electing joint life, annuity fees may be higher and income guarantees may be lower than those for a single life.

What lifetime income option best describes this annuity purchase?

Single Life (Annuitant's life only) Joint Lives

Age of Annuitant at First Withdrawal

The annuitant is currently undefined years old. The age of withdrawal should be greater than the current age for income later or the same as the current age for income starting now.

What age will the annuitant be when they plan to begin taking income? *


Premium and Income Needs *


Would you like to enter the annuitant's needed annual income or an available initial premium?

Initial Premium Annual Income Needed

Initial Premium

What is the anticipated initial premium? *

 Select from available annuities

 Validate a proposed annuity

Annuity To Be Validated

Please select a carrier *

The state of issue must be selected in order to view available carriers.

Contract Name

Rider

A rider must be selected.

When all required fields are complete select 'Evaluate Annuities'.

This will generate a **GREEN** report for suitable clients and **YELLOW** OR **RED** for non suitable clients.

Risk Tolerance *

When considering this annuity purchase, what is the annuitant's risk tolerance?

Conservative Moderately Conservative Moderate Moderately Aggressive Aggressive

Notes (Enter any applicable information related to this case)

 Save Work in Progress

Evaluate Annuities →



Annuity Selection

← Compare Products

Download Full Report

Product Validated



FIA

Athene - Performance Elite 7

Total Fees: 0.00%

Close

Download Factsheet

Reasons

Product Summary

Rate Summary

Compliance Information

Area	Status	Area	Status
Age	✓	Financial Experience	✓
Income	✓	Liquidity Needs	✓
Funding Resources	✓	Liquid Net Worth	✓
Financial Objective	✓	Risk Tolerance	✓
Intended Use of Policy	✓	Tax Bracket	✓
Existing Assets	✓	Willingness to Accept Non Guaranteed Elements	✓
Time Horizon	✓	Insurance Needs	✓

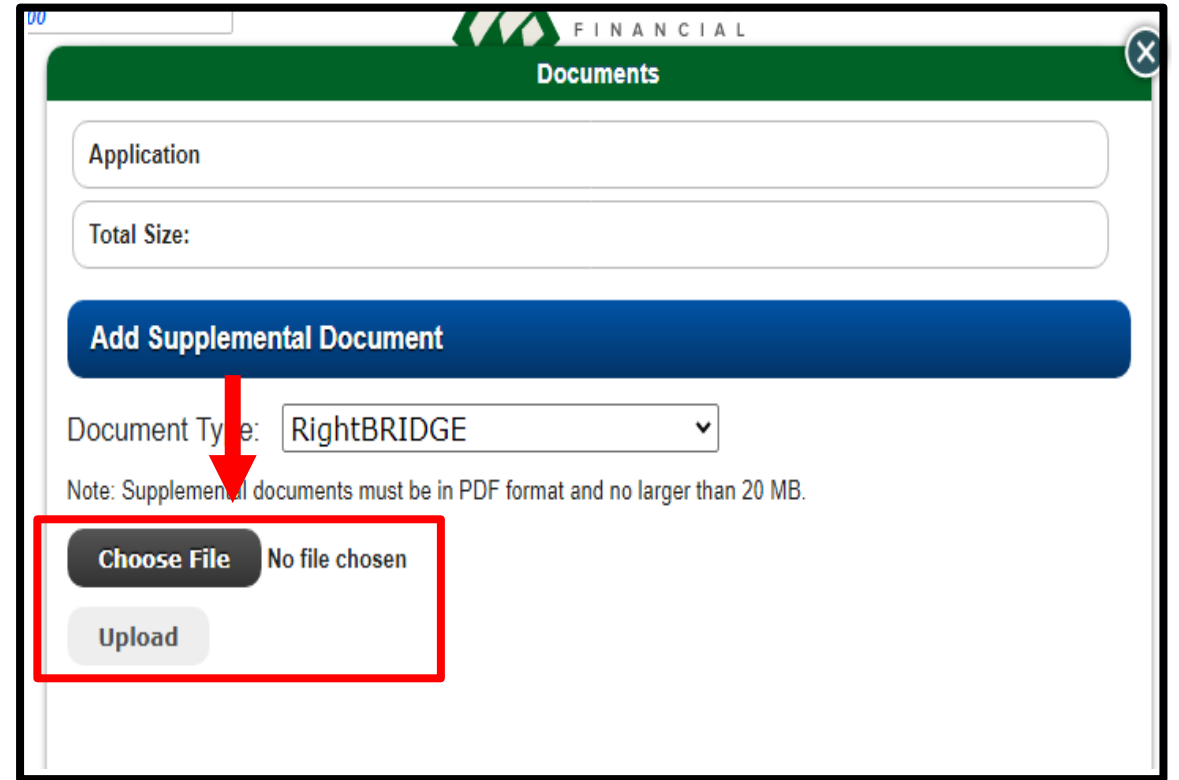
For **YELLOW** OR **RED** reports WFG will consider making exceptions. Please reach out to your Review Team to make the request.

To expedite the review process, the agent will want to make sure they have the following information available.

1. A clear statement that provides what the client is looking to accomplish, specifics about the client and details about the case (e.g., how you know the client, what options were discussed with the client, why the client decided to move forward with this current strategy, what advantages/disadvantages are there between the client's new plan vs their old plan).
2. Provide current statements and/or hypothetical illustrations from current policies.
3. Provide any illustrations that have been pulled

You may email the request to the following email addresses:
WFG REVIEW – WFGFAREVIEW@TRANSAMERICA.COM

GREEN reports: Please be sure to upload reports with the electronic application in Firelight before signing.



If you have any questions regarding Rightbridge Reports, please contact the WFG Sales Desk at (770) 934-7355.