

Tired of Receiving Paper Statements in the Mail?

Effective January 1, 2007, agents contracted with Old Mutual Financial Network (OMFN) will be required to receive their commission payments via Electronic Funds Transfer payment method (EFT). Additionally, due to the fact we'll be discontinuing all mailings of paper copy commission statements, you'll be able to reduce the amount of paper you receive in the mail by simply accessing SalesLink for all of your commission statement details as well as policy level transaction details.

SalesLink will now be your one-stop-shop for all commission-related information. All of the information that is currently provided on the paper copy mailing will be displayed as well as details on policy level transactions. Additionally, SalesLink will offer agents the ability to access statement detail for each of an agent's downline. Presently, downline statement detail is not included in the paper copy mailings.

Several options will be available for retrieving statement information:

Via SalesLink:

- An online view that is presented in a layout similar to the paper copy version
- Print out of the data in the online view layout
- Download of the data in an Excel spreadsheet which will provide flexibility in organizing the data as needed and/or uploading to an internal database for more detailed analysis

Via email:

- Automatic email of the current commission statement at each pay cycle

Active and Terminated Agents Paid by Check

Agents who currently receive their commission payments by check are encouraged to consider Electronic Funds Transfer payment method (EFT). With EFT the payment is likely to be deposited to your account sooner than if it is mailed and then manually deposited. Bear in mind that agents on a Check Payment method will be restricted to a monthly payment frequency *only* with no exceptions once this new policy goes into affect.

For your convenience, forms required to make the switch to EFT are enclosed and are also available for download from SalesLink via the following link: SalesLink > Sales Support > Guidelines > Electronic Funds Transfer. Completed forms should be returned to the following fax number: 410-895-0129. Please give special attention to clearly print all bank account information on the EFT form. The change from check to EFT is expected to be processed within two pay cycles of receipt by OMFN. Agents can monitor the status of this change in payment method on SalesLink.

Agents with a payment method of check currently receive a Statement Summary page with the check in the lower section of that summary. The Summary page with the check will continue to be mailed as it is today. However, the Statement Detail pages that are generally included with this summary will no longer be attached as of January 1, 2007.

Active and Terminated Agents Paid by EFT

If you are currently set up for payment by EFT then there is no need to complete a new EFT form. Payments will continue to be made as they are today.

Agents with a payment method of EFT currently receive a Statement Summary page with the EFT confirmation in the lower section of that summary. The Summary page with this confirmation will no longer be mailed as of January 1, 2007. The Statement Summary on SalesLink will be considered confirmation of the earned commission and payment amount.

Terminated Agents Access to SalesLink

Terminated agents currently receive paper mailings of their statements and do not have permissions to access their statements on SalesLink. Effective January 1, 2007, all terminated agents with commission activity will be given access to the Commission Statement sections of SalesLink. Commission Statements will no longer be mailed to terminated agents after that date.

Option for Statements via Email

Agents with access to SalesLink have the option of receiving commission statements by email. This option is activated through the Subscription feature. Activating the statement subscription option will trigger the current commission statement to be automatically sent to the email address entered in the subscription screen. Agents currently receiving paper copy mailings are encouraged to take advantage of this method of receiving statements. Agents must update their subscription profile and email address to begin receiving the statements via email.

Agents are encouraged to plan ahead for these exciting changes by (a) arranging for EFT payments, and (b) updating their email address(s) on SalesLink subscriptions, and (c) activating the subscription commission statement email option. Completing these steps well in advance of this change will minimize the impact of this transition.

Notification of this change will be inserted in all commission statement mailings prior to January 1, 2007. Notices will also display on SalesLink prior to the January 1, 2007 implementation of this change. Agents who recently submitted forms to change their payment method from Check to EFT and/or who have updated their SalesLink email addresses please disregard the notices.

We look forward to working with you and your respective downlines as we implement these time-saving, exciting enhancements!