

How to Grant Your Financial Professional Access to Perform Transactions on Online Servicing

You can now digitally provide consent for your financial professional(s) to initiate certain updates on your behalf online. This includes: phone number and address changes, one-time withdrawals, and bank information changes.

Note:

- Certain transactions may be unavailable for select products
- Your authorization will remain on file until it is either manually revoked or a new servicing agent is requested
- Transaction availability for your financial professional is subject to firm approval – speak to your financial professional for details

Step 1

Log in to your **brighthousefinancial.com** account and select the contract you'd like to update

Index-Linked Annuity		
Brighthouse Shield® Level II 6-Year Annuity	Contract # 123456789	Account/Contract Value \$56,832.41
Qualified <input type="checkbox"/> Active <input type="checkbox"/>	Contract Effective Date 12/5/2024	Values as of close of business 10/31/2025

Step 2

Select **Financial Professional Authorization Form** from the **I want to** drop-down menu.

I want to	Contract Details		
Export	Contract Updates	Owner Updates	BHF Servicing Forms
View Prospectus	Shield Option Transfer	Update Address	Brighthouse Servicing Forms
Export Contract Details Report	Shield Performance Lock	One-Time Withdrawal	Annuity Withdrawal
Contract Summary Report		Update Beneficiaries	Beneficiary Change
View Contract Packet		Update Bank Information	RMD Election
		Financial Professional Authorization Form	

Step 3

Review the **Consent and Authorization Agreement** and **Available Transactions**, then enter your Social Security Number. This consent will need to be provided separately for any additional contracts.

Financial Professional Authorization Form

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Consent and Authorization Agreement

Completing and submitting this form will authorize your Financial Professional to submit the following transactions on your behalf. You can withdraw your consent at any time by selecting "Financial Professional Authorization Form" from the "I Want To" menu online, or by calling toll free at 1-800-882-1292. More information on submitting requests can be found in your contract or a recent statement. This consent will need to be provided separately for any additional contracts.

Please Note - Transaction availability for your Financial Professional is also subject to firm availability. Please check with your Financial Professional for details. If your Financial Professional does not have availability from their firm, they will not have access to make transactions on your behalf.

Available Transactions:

- Update Address
- Update Phone Number
- One-Time Withdrawal
- Update Bank Information

If you wish to authorize your Financial Professional to complete these transactions on your behalf, please complete the electronic signature and submit. Authorization will be granted to the servicing agent(s) currently on file. Removing or changing servicing agents will revoke this authorization and a new request will need to be submitted.

Authorization will remain active until either:

- I: A change of Servicing Agent is requested.
- II: Verbal or electronic request by the Contract Owner.

* Confirm Social Security Number (SSN/TIN). This is subject to the Social Security Number Certification below.

Step 4

Review and agree to provide consent by checking the boxes next to each message.

I acknowledge that I have read, agree, and sign the Consent and Authorization Agreement above.

I acknowledge that I have read, agree and sign the **Important Notice on Taxes and Withholding Election**.

I acknowledge that I have read, agree, and sign the **Social Security Number Certification** (Substitute IRS Form W-9) under penalties of perjury.

Please note - The Internal Revenue Service does not require your consent to any provision of this document other than the certification required to avoid backup withholding.

Step 5

Input your signature, select **Authorize**, then **Submit**.

Contract Owner: John Doe

* Owner/Authorized Signer

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By providing my signature in the box above and selecting **Authorize** below, I hereby provide my electronic signature. I understand that I must also click "Submit" below to finalize this document. I have also reviewed and consented to the *Electronic Record and Signature Disclosure*.

Authorize

Cancel **Submit**



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brighthousefinancial.com

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• Not Guaranteed by Any Bank or Credit Union • May Lose Value

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