



Allianz Preferred

Requirements for financial professionals

Allianz Preferred is an industry-leading sales platform that is available to select financial professionals. We ask our members to meet certain requirements to be part of this exclusive group.

FINANCIAL PROFESSIONALS CONSIDERED FOR ALLIANZ PREFERRED¹

- 1 Must pass a current background check
- 2 Agree not to accept any compensation for the sale of Allianz Preferred products beyond the compensation paid by Allianz Life Insurance Company of North America (Allianz)
- 3 Meet **one** or more of the following factors:
 - \$500,000 of Allianz annuity production, \$50,000 in Allianz target life insurance production, or equivalent combination issued in a calendar year in any one of last five years or any two of the last 10 years
 - Registered representative (Series 6 or 7) active with a broker/dealer verified through FINRA BrokerCheck
 - Investment adviser representative (Series 65 or 66) active with a registered investment adviser verified through SEC Public Disclosure
 - \$50,000 in commissions for any insurance business (i.e., life insurance, annuity, P&C, medical, LTC) within the last year verified by carrier 1099s, MDRT statements, or commission statements in the producer's name
 - \$500,000 of industry fixed index annuity or fixed annuity premium within the last year, evidenced by MDRT statements or carrier-substantiated production in the producer's name
 - One of the following active professional licenses or designations, verified by producing the active license/designation documentation from the designating body:
 - **CFA** (Chartered Financial Analyst)
 - **CFP** (Certified Financial Planner)
 - **ChFC** (Chartered Financial Consultant)
 - **CLU** (Chartered Life Underwriter)
 - **CPA** (Certified Public Accountant)
 - **RICP** (Retirement Income Certified Professional)
 - **LUTC/LUTCF** (Life Underwriter Training Council Fellow)

Questions?
Please call the
FASTeam at
800.950.7372

HOW A FINANCIAL PROFESSIONAL CAN BE CONSIDERED FOR ALLIANZ PREFERRED

Complete and fulfill the requirements of the Allianz Preferred Agent Agreement with an Allianz Preferred FMO. (Not all FMOs have an Allianz Preferred FMO contract.)

¹ Consideration for Allianz Preferred is subject to our review of agent history, background, and other factors.

Products are issued by Allianz Life Insurance Company of North America, 5701 Golden Hills Drive, Minneapolis, MN 55416-1297. www.allianzlife.com