

What Financial Professionals Need to Know about Pacific Life's New Business Status Tracker

Pacific Life is extremely excited to enhance your experience tracking your annuity business via the new business status tracker. This will vastly enhance your ability to do business with us by providing transparency throughout the application and funding process.

Key Features include

- Ability to view your list of new business applications all in one place
- View detailed status of your applications from submission through contract issue
- Real-time updates related to sources of funding
- View good order status for application and transfer paperwork
- View any not in good order issues and steps to resolve them
- Ability to see when funding has been received by Pacific Life
- Receive duplicate copy of contract electronically upon contract issue


Additional status updates for New York annuity business

- Enhanced identification of applications with New York transfer business (Reg 60)
- Simplified, detailed, real-time status updates on both one-step and two-step Reg 60 processes

Accessing the New Business Status Tracker

You can access the "Pending Applications & Recently Issued Contracts" button from the [Pacific Life Annuities Dashboard](#).


New Business

 **Pending Applications & Recently Issued Contracts**

- Track the status of applications & funding
- View & download recently issued contracts

Pending Applications Tab





After clicking the button from the dashboard, you will see a list of all your ongoing applications. From here, you can view the status of pending applications.

PACIFIC LIFEPending ApplicationsRecently Issued ContractsMy Dashboard

Welcome Brad!

Below is a list of applications currently in progress. Once a contract becomes issued, it will move to the recently issued contracts tab.

Pending Applications

Application Status	Contract #	Owner	Last Updated	Plan Type	Product	
Awaiting Funds 	VM23124353	Doe, Jane	Jan 31 2023	IRA	Pacific Choice 2	Status
Awaiting Funds 	FA23124576	Smith, John	Jan 30 2023	Non-Qual Individually...	Pacific Expedition 2	Status
Application Received 	FX23124552	Li, Stephen	Jan 28 2023	Non-Qual Individually...	Pacific Index Edge	Status
Application Received 	VR23124598	Jones, Mark	Jan 28 2023	IRA	Pacific Odyssey	Status


Recently Issued Contracts

Clicking on the “Recently Issued Contracts” tab at the top of the page will take you to a list of your contracts that have been issued in the last 90 days. You can access duplicate contracts electronically and view the progress of any recent business, such as information about additional funds that are expected to be received. After 90 days, contracts can be found in your contract management list.

The original contract will still be mailed according to your broker/dealer’s selling agreement with Pacific Life.

Status Tracker

The Status Tracker allows you to follow up on the status of applications in real time without having to call Customer Service. By clicking "Status" from any application or recently issued contract, you can view the progress of the application from submission all the way through contract issuance. Any outstanding requirements and transfer updates will also be surfaced here.

Pending Applications Recently Issued Contracts My Dashboard

[Back to all applications](#)

Application Status for Jane Doe

Application Information

Advisor of Record
Ronald Oregano

Contract # **VM23124353** Product **Pacific Choice 2**

Plan Type **IRA** Annuitant **Jane Doe**

Contract Owner Information

Owner
Jane Doe

Phone Number
(323) 123-1234

Email Address
janedoe@gmail.com

Address
123 Main St, Cityville, NJ, 11111

Current status began on Jan 31, 2023

Awaiting Funds

- Application Received Jan 29 23
- Awaiting Funds** Hide details ^ Jan 31 23
- ABC Bank**
(123) 123-1231 | Account # *****01
● Transfer paperwork is in good order, we will send to ABC Bank within one business day Jan 31 23
- Funds Received
- Contract issued

Need Help?

While we are confident that our status tracker can provide you a more efficient way to manage your annuities new business applications, we are continually working to improve the experience that it offers to our financial professionals. We value the feedback of our users to help us understand what we are doing well, and where we have opportunities for improvement. If you need additional assistance, please contact Customer Service.

Award-winning Pacific Life Customer Service

We at Pacific Life take great pride in our industry-leading and award-winning service, the support from professionals, and knowledgeable annuity information specialists. We are humbly honored to have received multiple DALBAR Service Awards since 1997.

Contact our award-winning Pacific Life Customer Service team.

(800) 722-2333, or (800) 748-6907 for New York
M–F, 6:00 A.M.–5:00 P.M. PT