AFFIRM® for Annuities

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Product release notes for all products can be viewed on the iPipeline ***Customer Portal***. To receive automatic notifications when new release notes are published, log onto the iPipeline Customer Portal, go to *Resources* > *Release Notes* and select the product(s) that you would like to receive notifications for.

AFFIRM FOR ANNUITIES: SPRING 2026 RELEASE

Release Date: UAT Release: May 1, 2026 | Production Release: June 5, 2026

Note:

- *Organic feature* = feature is automatically available with no configuration needed
- *Exploitable feature* = feature requires activation / configuration (an additional cost may apply)
- *Requires Action* = feature requires the client to take certain actions to avoid errors / loss of product performance (see the Requires Action section below for details on any required actions).

MAINTENANCE

APP-4490 – Book of Business: Refined internal API authentication to improve performance and availability

Ensure that each client invocation of the AFFIRM BoB API uses freshly obtained authentication credentials to enhance security, prevent credential reuse or expiration issues, and maintain compliance with AFFIRM authentication requirements while remaining transparent to client services.

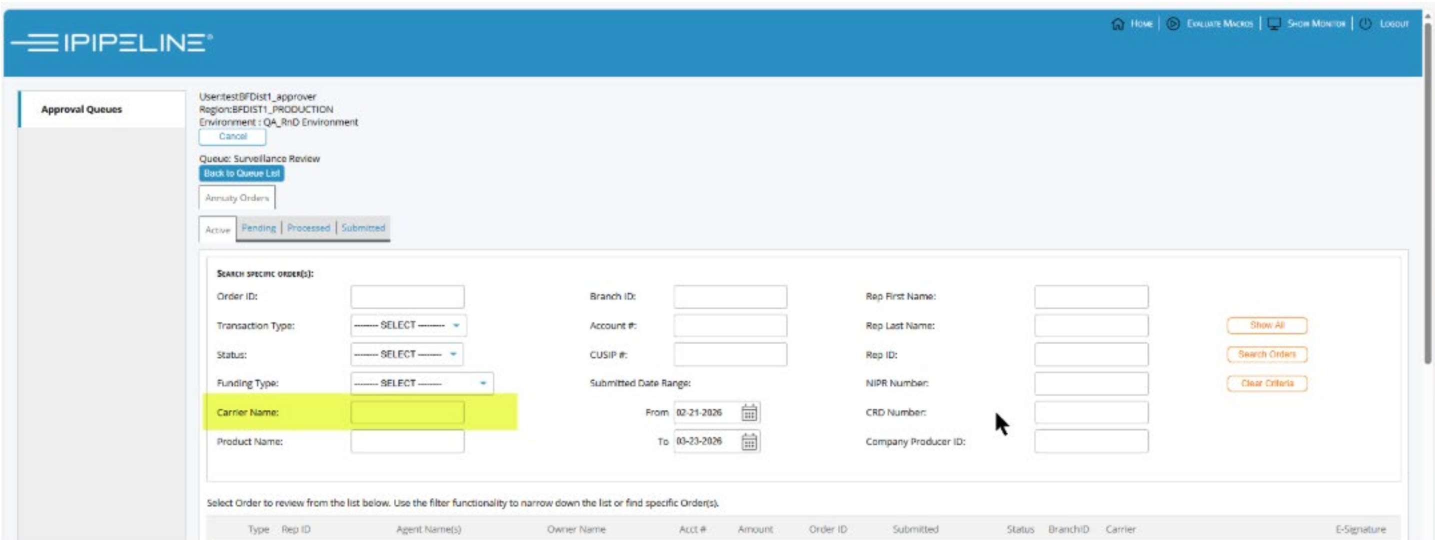
FEATURES / ENHANCEMENTS

APP-4416 – Approval Queues Dashboard: Add Carrier Name Filter to Approval Queue

Impacts / Availability: This is an organic feature that will be available to annuity distributors.

Cost: There is no separate cost associated with this functionality.

Overview:
Approvers currently cannot narrow down their approval list based on the carrier associated with a product in an order. This creates noise and slows decision-making, especially for approvers responsible for multiple carrier product sets. Adding a Carrier Name filter in the Approval Queue will allow users to quickly isolate relevant orders and reduce time spent sorting through unrelated approvals.

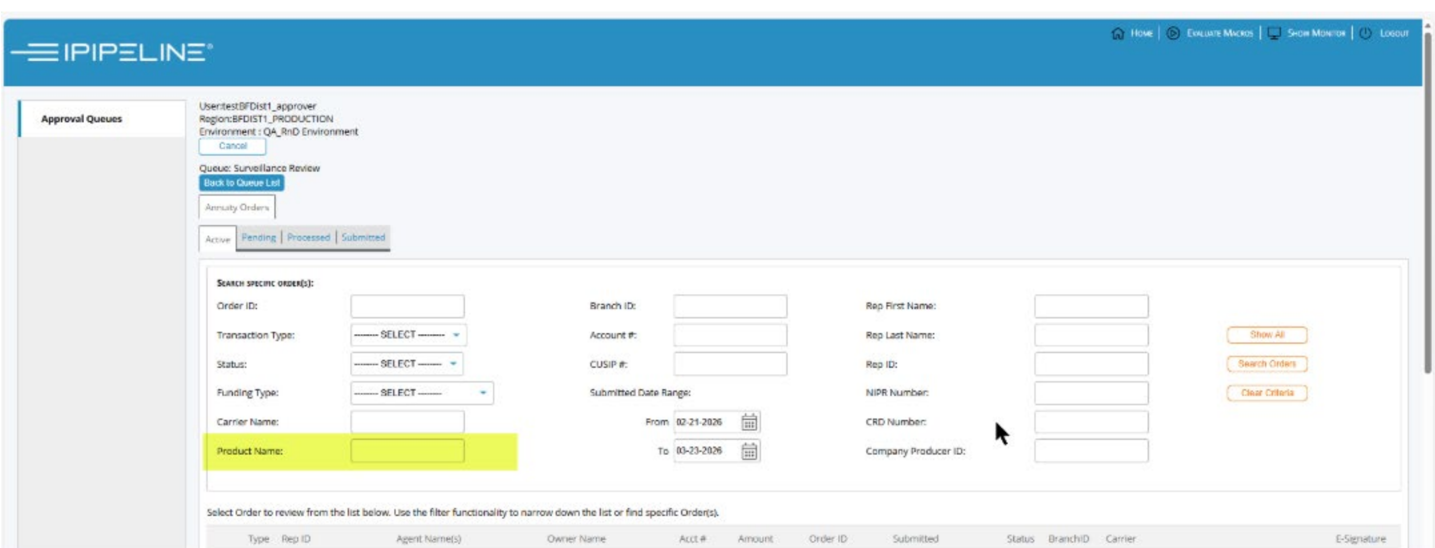


APP-4417 – Approval Queues Dashboard: Add Product Name Filter to Approval Queue

Impacts / Availability: This is an organic feature that will be available to annuity distributors.

Cost: There is no separate cost associated with this functionality.

Overview:
Approvers often only manage or care about orders tied to certain products, but the Approval Queue currently offers no way to filter by product. This forces users to manually scan through a long list of orders to find relevant ones. Adding a Product Name filter will streamline approval workflows, improve accuracy, and reduce time spent searching.



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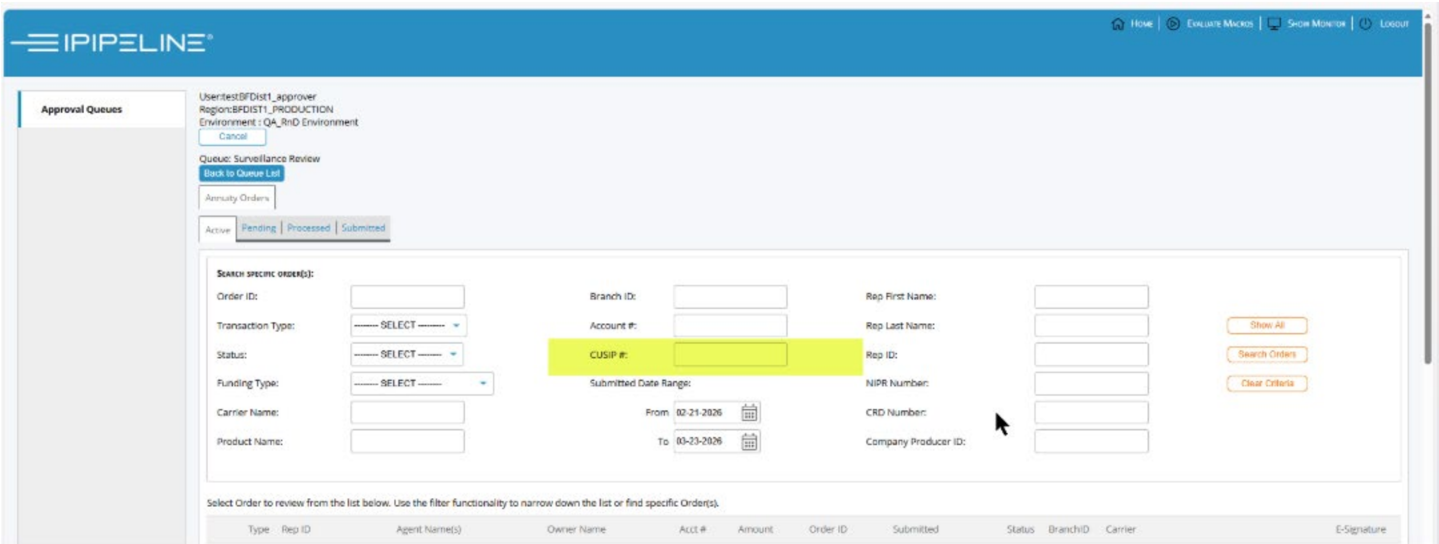
APP-4418 – Approval Queues Dashboard: Add CUSIP Filter to Approval Queue

Impacts / Availability: This is an organic feature that will be available to annuity distributors.

Cost: There is no separate cost associated with this functionality.

Overview:
Approvers often need to locate orders associated with a particular financial product, and CUSIP is the most precise identifier for these products. Currently, the Approval Queue does not offer a way to filter by CUSIP, forcing users to manually scan order details. Adding a CUSIP field improves precision, reduces time spent searching, and lowers the risk of missed or incorrect approvals.



CARRIER CHANGE REQUESTS

CON-37 – New Carrier Onboarding: Augustar Financial

AuguStar Financial

ET-29 – New Carrier Onboarding: EquiTrust

EquiTrust Life Insurance Company

FIXES

- **APP-4083: Funding Tab | 1035 Exchange Policy Import, rules should not apply when manually entering a policy**

  When entering in a 1035 exchange or Qualified Policy Transfer where policy import is available, if no policy is imported and the user manually enters in the exchange data, in the surrendering policy detail, if the policy number manually entered in matches the policy number of a policy that is available for import, then when the policy appears as imported on the policy import page. Only policies selected for policy import should be reflected as imported on the policy import page.

- **APP-3273: Funding Tab | Yellow Pages - If an imported policy has a universal location indicator in the file the clear button should not be active on the surrendering carrier info subtab**

- **APP-1486/2180/2181: Self Service | 'Apply' Button does not work when editing Common Map description, Form Name or Question Set description**

  The apply button does not save description for the Common Map, Form Name and Question Sets. The description is saved when the user navigates forward, but not when 'Apply' is selected and then user exits.

- **MM-443: Data Transfers | Custom TX103 along with OSR not transmitted to MassMutual carrier**

- **APP-4495/GEN-21558: Electronic Consent Tab | AuthorizationSelections are not being cleaned up properly**

  If users go back and forth on the Electronic Consent Tab, Authorization nodes were sometimes becoming "orphaned" when selections changed. This was causing periodic APP/SUB Stage 61 failures. (fixed on 5/15).

- **KST-1521: Forms Submit Tab | Remove reference to Phone Number When Resending e-Sign Notification to a Party**

  When users clicked the "Resend Email" button, the Confirmation message said both the email address and phone number will be updated. Only the email address is updated. (fixed on 5/15).

REQUIRES ACTION

The below actions must be taken to avoid errors and / or a loss of product / platform performance.

Testing Expectations

iPipeline expects distributors and carriers to perform some level of testing to validate no impacts to their specific products/processes during the generic release/UAT window. If the distributor and/or carrier intends to use specific features, they should test/validate the relevant features/fixes as well.

For carriers, please check Distributor Versions as not all distributors are on the latest platform release.

Recommended Browser / Screen Resolution

- For optimal viewing/user interface (UI) experience (applies to generic iPipeline branding):
    - Primary Recommended/Supported Browser: Current Chromium-Based Microsoft Edge or Current Google Chrome
    - Secondary Recommended/Supported Browser: Internet Explorer 11 on Windows 10
        - Note there are certain UI/html elements that Internet Explorer doesn't support and will look different from Chromium-based Microsoft Edge or Chrome.
    - Recommended Screen Resolution: 1920 x 1080