

Payment Center Year-End Activities

TIPS AND REMINDERS

To make payments for Life and Annuity policies:

Customer Web Portal:

visit <https://www.nationallife.com>

- This is by far the easiest way for your client to make payments, update their account information, or request disbursements!
- In the upper right corner, click Login/Register and select customers.
- **REMEMBER** — customers can use the web portal to make initial premium payments! The portal will be available for login three days after issuance.

Automated phone payment: Call 1-800-732-8939

- Press 2 for automated phone payments and follow the prompts.
- They will need to have a copy of their premium or loan notice in front of them. **Please note:** The policy number must be entered in the same format as it appears on the bill.
- The automated payment option is only available for policies which are in-force. For customers paying initial premium, follow the prompts to speak to a customer service representative.

Automatic payments via EFT/ACH

- There is an updated 1707/EFT Authorization form available on our website — this version is easier for the customer to understand and enables payment on multiple policies. (Older versions will still be honored.)
- Customers who wish to sign up for automatic payments for recurring premium and/or loan payments on a monthly, quarterly, semi-annual, or annual basis may enroll in our Automatic EFT payment option.
- [Click here to access the form.](#)

Wires

- JPMorgan Chase
- ABA No: 021000021
- **For Life Business:**
 - Account Name: NL EFT Premium Account
 - Account Number: 323115888
- **For Annuity Business:**
 - Account Name: Life Insurance Company of the Southwest
 - Account Number: 8805011770

Be sure to include the policy number and insured's name

Checks

- Of course, checks are welcome as well.

Products issued by

National Life Insurance Company® | Life Insurance Company of the Southwest®

National Life Group® is a trade name of National Life Insurance Company (NLIC), Montpelier, VT, Life Insurance Company of the Southwest (LSW), Addison, TX and their affiliates. Each company of National Life Group is solely responsible for its own financial condition and contractual obligations. Life Insurance Company of the Southwest is not an authorized insurer in New York and does not conduct insurance business in New York.

Annuities:

For all business, please submit the contribution check along with the contribution notice to:

National Life
PO Box 121109, Dept 1109
Dallas, TX 75312-1109

Life:

For initial payments, please mail to:

National Life
1 National Life Drive
Montpelier, VT 05604

After initial payment, please submit checks to the address on your bill.

For your Life and Annuity disbursement requests, please email Disbursements@NationalLife.com

To make time-sensitive disbursement requests before year-end:

Any Life or Annuity policy disbursement request (including required minimum distributions) received by the Home Office after **Monday, December 9** may not be processed prior to year-end. In order to ensure processing within the 2024 tax year, please submit disbursement requests in advance of this date.

No bank or credit union guarantee | Not a deposit | Not FDIC/NCUA insured | May lose value | Not insured by any federal or state government agency

Guarantees are dependent upon the claims-paying ability of the issuing company.

For Agent Use Only – Not For Use With The Public