Online User Guide for Clients

Client Account Login

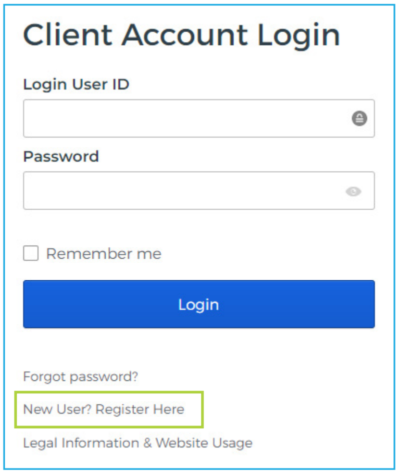
Tax Documents

How to Register/Login:

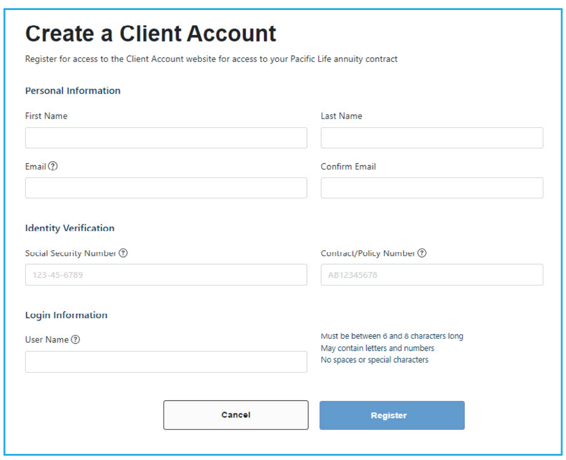
NEW USERS

1. Visit the [Client Account Login]

2. Click **"New User? Register Here"**

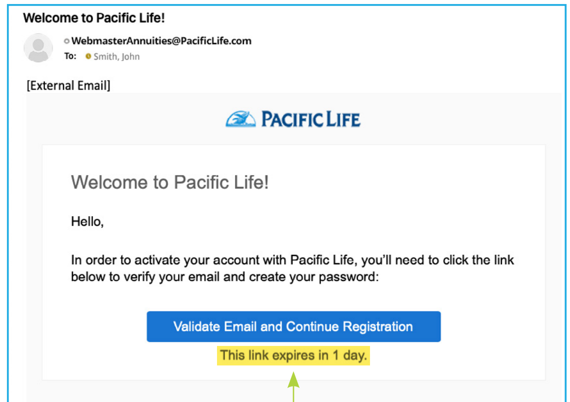


3. Complete the fields in the "Create a Client Account" screen and click **"Register"**

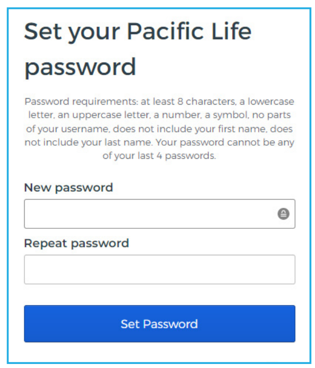


Emails will be sent from:
WebmasterAnnuities@PacificLife.com
Subject Line: **Welcome to Pacific Life!**
and will contain the link to create a password.

4. To create your password click the **"Validate Email and Continue Registration"** link **in your email**. Once completed, click **"Set Password"**.



Note: This link is valid for 24 hours.



PASSWORD REQUIREMENTS

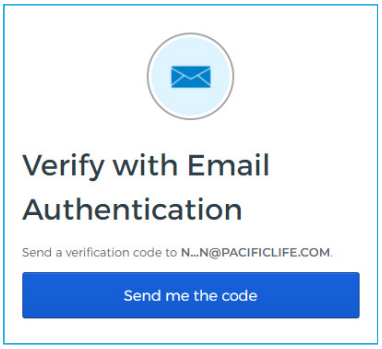
Must Include

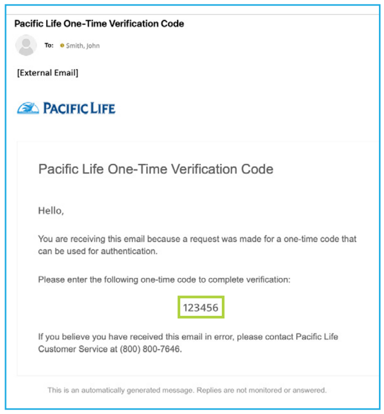
- At least 8 characters
- A lowercase letter
- An uppercase letter
- A number
- A symbol (Examples: $ % \ * ? = ^ +)

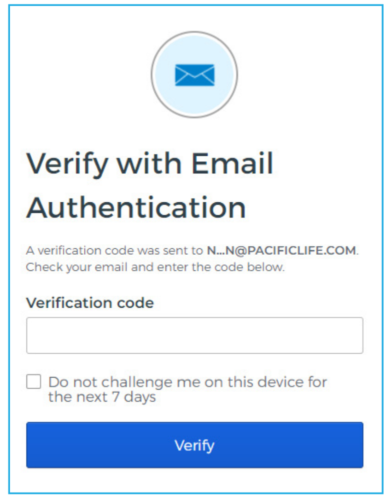
Do NOT Include

- Any part of the username
- First name
- Last name
- Spaces
- Any of the last 4 passwords used
- More than 25 characters

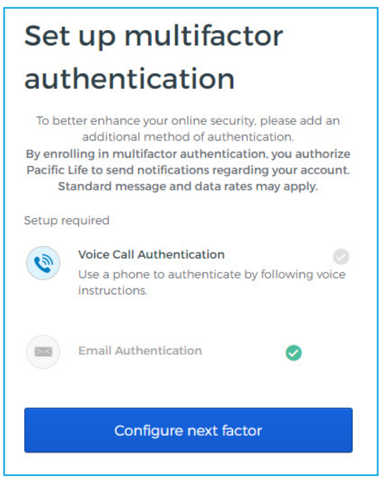
5. Click **"Send me the code"**
(DO NOT NAVIGATE AWAY FROM THIS WINDOW ASKING FOR MFA CODE), check your email for this MFA verification code, **enter this code** and click **"Verify"**

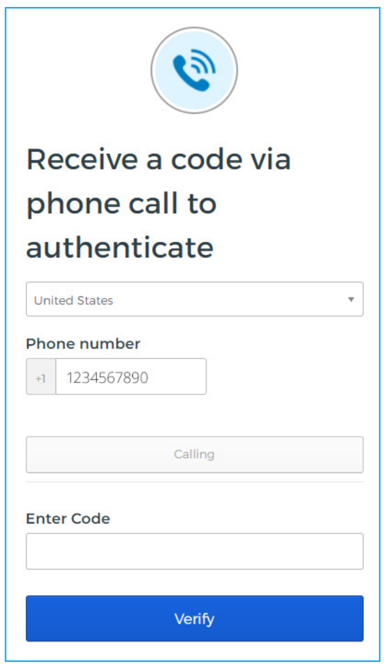


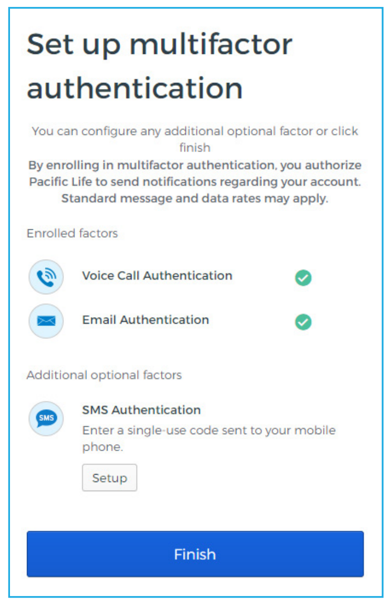




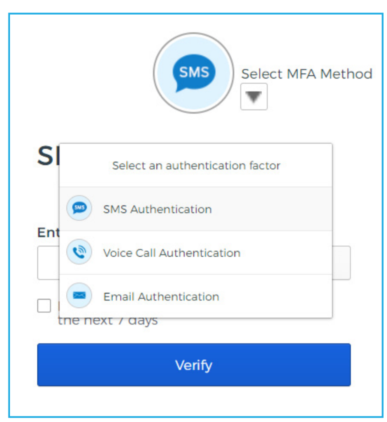
6. Set up **"Voice Call Authentication"** , enter the code, and **"Finish"**







EXISTING USERS



1. Visit the [Client Account Login]

2. Enter Login User ID and Password

3. Select MFA Method

4. Based on the MFA factor you selected in Step 3, check your e-mail, answer your phone (system will immediately call back for voice call), or SMS (text message) for MFA verification code **(DO NOT NAVIGATE AWAY FROM THIS WINDOW ASKING FOR MFA CODE).**

5. Emails will be received from: WebmasterAnnuities@PacificLife.com

How to Access Online Tax Documents:

After logging on to Pacific Life's Client Account Login, follow these instructions:

1. For clients with more than one contract, click the appropriate contract number on the contract list.
   For clients with one contract, proceed to the next step.
2. Hover over the **Contract Information** drop-down menu and select **Document Center** or **Online Tax Documents:**
   - In the Tax Documents Section, the most recent document displays on the top.
   - In the Document Center, click the **"Tax Documents"** tab on the top right to see all the 1099s available.
3. When the 1099-R opens, click the printer icon to print either the entire PDF file or specific pages.

For more information, please visit our website to view
IRS Form 1099-R Questions and Answers.

Annuities.MyAccount.PacificLife.com

PACIFIC LIFE

THE OFFICIAL SPONSOR OF RETIREMENT®