

# Everlake Policy and Contract Transition

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**Q1: Who is Everlake?**

A1: On January 26, 2021, Allstate announced it had entered into an agreement to sell Allstate Life Insurance Company and Allstate Assurance Company to Everlake US Holding Company. The sale became final on November 1, 2021. The Allstate Assurance Company name was changed to Everlake Assurance Company and the Allstate Life Insurance Company name was changed to Everlake Life Insurance Company, respectively.

**Q2: What does the sale mean to me?**

A2: The change of ownership does not affect any of the contractual provisions or guaranteed elements of your policy. In addition, Everlake remains subject to the same regulations that were in effect prior to the sale of the company.

**Q3: How were customers originally informed about the transaction?**

A3: Allstate mailed letters to all affected life insurance and annuity customers in December 2021 and January 2022. Additionally, endorsements were mailed in 2022 changing the name of the issuing insurance company to Everlake Life Insurance Company or Everlake Assurance Company. Notices and Endorsements were mailed to the policyowner address on file.

**Q4: When were endorsements mailed?**

A4: Allstate mailed amendatory endorsements in 2022, changing the name of the issuing insurance company to Everlake Life Insurance Company or Everlake Assurance Company, as applicable.

**Q5: Who will service my policy?**

A5: Allstate, as Everlake's administrator, will continue to service your policy during a transition period. Your relationship with your financial representative will not change, regardless of who is servicing your policy. You will be notified about any servicing changes as they occur.

Servicing has transitioned from Allstate to Everlake's new administrator, Transaction Applications Group, Inc. (TAG) for customers with the following product types:

- All term Life Insurance products except Monthly Income Term and Universal Term
- All annuity contracts
- Select whole life products including Whole Life Tribute, Whole Life II, and Whole Life (excluding the following: 20-Pay Life, College and Career, Endowment, Executive Whole Life, Family Plans, Instant Life, Money Back at 65, Whole Life Paid up at 65, and Young American which continue to be administered by Allstate).

Currently, all other products remain serviced at Allstate.

Customers whose policies and contracts have migrated to TAG received a letter indicating the administration of their policy or contract was transitioning from Allstate to TAG.

**Q6: Who is Transaction Applications Group (TAG)**

A6: Transaction Applications Group, Inc. (TAG), is a wholly owned subsidiary of NTT DATA Services Holdings Corporation (NTT). TAG is Everlake's new administrator.

**Q7: When will I see name changes on my bills or letters?**

A7: We have already started updating correspondence and other documents; these changes will continue over the next few months.



### **Q8: Will this change what I see on my bank statements when my monthly payment is taken?**

A8: At a future date, you will see the name changed on your bank statements to reflect Everlake. Your draft date and amounts will remain unchanged.

### **Q9: What if I need to make a change on my policy (coverage, address, etc.)?**

A9: Policies are moving to the new servicing provider in a phased approach so you will receive notifications for each policy or contract as they move to TAG for servicing. Until you receive this notice, continue to contact the current service provider, Allstate. When your policy has moved to the new service provider, contact information will be included in your notice.

### **Q10: What if I have a claim?**

A10: Until you receive notice of a change in service provider, please continue to contact the Allstate claims area as they are still servicing the policy.

Customers who have received notice that their policy or contract servicing has transitioned to Transaction Applications Group, Inc. (TAG) should visit the Policy Services page on [everlakelife.com](https://everlakelife.com) to obtain contact information for submitting a claim.

### **Q11: When will TAG/NTT start taking calls/chats from policy owners?**

A11: Policies are moving to the new service provider in a phased approach so you will receive notifications for each policy or contract as they move to TAG/NTT for servicing. Effective November 25, 2024, the following products are serviced by TAG/NTT:

- All term Life Insurance products except Monthly Income Term and Universal Term
- All annuity contracts
- Select whole life products including Whole Life Tribute, Whole Life II, and Whole Life (excluding the following: 20-Pay Life, College and Career, Endowment, Executive Whole Life, Family Plans, Instant Life, Money Back at 65, Whole Life Paid up at 65, and Young American which continue to be administered by Allstate).

### **Q12: Does Everlake have an online customer portal address?**

A12: Yes, customers with products that have transitioned to TAG prior to August 19, 2024 can use the new Customer Hub: <https://customer.everlakelife.com>. Policies will transition to TAG in phases; only products that have transitioned can be viewed on this portal.

Until you receive a transition notice, continue to contact the current service provider, Allstate. When your policy or contract has moved to the new service provider, contact information will be included in your notice.

### **Q13: Why did I receive two different bills with different addresses?**

A13: Policies are moving to the new service provider in a phased approach. If you have multiple policies, you may receive bills with different return envelope addresses. You will receive notifications for each policy or contract as they move to TAG for servicing.

### **Q14: Can I still send one check for multiple policies when I have bills with different addresses?**

A14: No, please send checks to the address listed on the most current bill. If you have multiple policies, it may be necessary to send premium payments to both Allstate and TAG.



**Q15: Will my policy number change?**

A15: No, your existing policy or contract number remains the same.

**Q16: How do customers contact Everlake or TAG going forward?**

A16: Customers with the policies and contracts listed below should use the following to contact Everlake/TAG. Customers whose policies and contracts have migrated to TAG received a letter indicating the administration of their policy or contract was transitioning from Allstate to TAG. Customers who have not yet received a notice of transition letter should continue to contact Allstate for service.

**For All Transitioned Products: Telephone Servicing Information for Customers Only**

Product	Contact Details/Hours
<b>Life Products:</b> All term Life Insurance products (except Monthly Income Term and Universal Term) and select whole life products including Whole Life Tribute, Whole Life II, and Whole Life (excluding the following: 20-Pay Life, College and Career, Endowment, Executive Whole Life, Family Plans, Instant Life, Money Back at 65, Whole Life Paid up at 65, and Young American)	Phone: 844-953-0347 Fax: 833-636-0034 Hours: M-F: 8:00 am - 7:00 pm CT Sat: 8:00 am - 4:30 pm CT
<b>Annuity Products:</b> All annuity products except Helmsman and Horizon Variable Annuities and RightFit	Phone: 844-953-2815 Fax: 833-636-0034 Hours: M-F: 8:00 am – 6:00 pm CT
<b>Annuity Products:</b> Helmsman and Horizon Variable Annuities and RightFit	Phone: 833-879-0774 Fax: 833-636-0035 Hours: M-F: 8:00 am – 6:00 pm CT
All Products Administered by TAG	Email: <a href="mailto:ELCustomerService@everlake.nttdata.com">ELCustomerService@everlake.nttdata.com</a>  Customer Hub: <a href="https://customer.everlakelife.com">https://customer.everlakelife.com</a>

Correspondence Item	Regular Mail	Overnight Delivery
Service and Claim Correspondence	Everlake PO Box 83328 Lincoln NE 68501	Everlake 777 Research Drive Lincoln NE 68501
Premium Payments For all products <u>except</u> Helmsman and Horizon Variable Annuities and RightFit	Everlake PO Box 6009 Carol Stream IL 60197-6009	Everlake 2640 White Oak Cir., Suite C ATTN: 6009 Aurora, IL 60502
Premium Payments For Helmsman and Horizon Variable Annuities and RightFit <u>only</u>	Everlake PO Box 6144 Carol Stream IL 60197-6144	Everlake 2640 White Oak Cir., Suite C ATTN: 6144 Aurora, IL 60502



**Q17: How do customers get service on policies and contracts that have not been transitioned?**

A17: Customers should continue to contact Allstate for products that have not been transitioned. If customers need to make name, address, email, or similar changes that affect both transitioned policies and contracts and other policies or contracts they own they will need to contact both Everlake service providers, Allstate and TAG to make those changes until all of their policies and contracts have been migrated to TAG.

