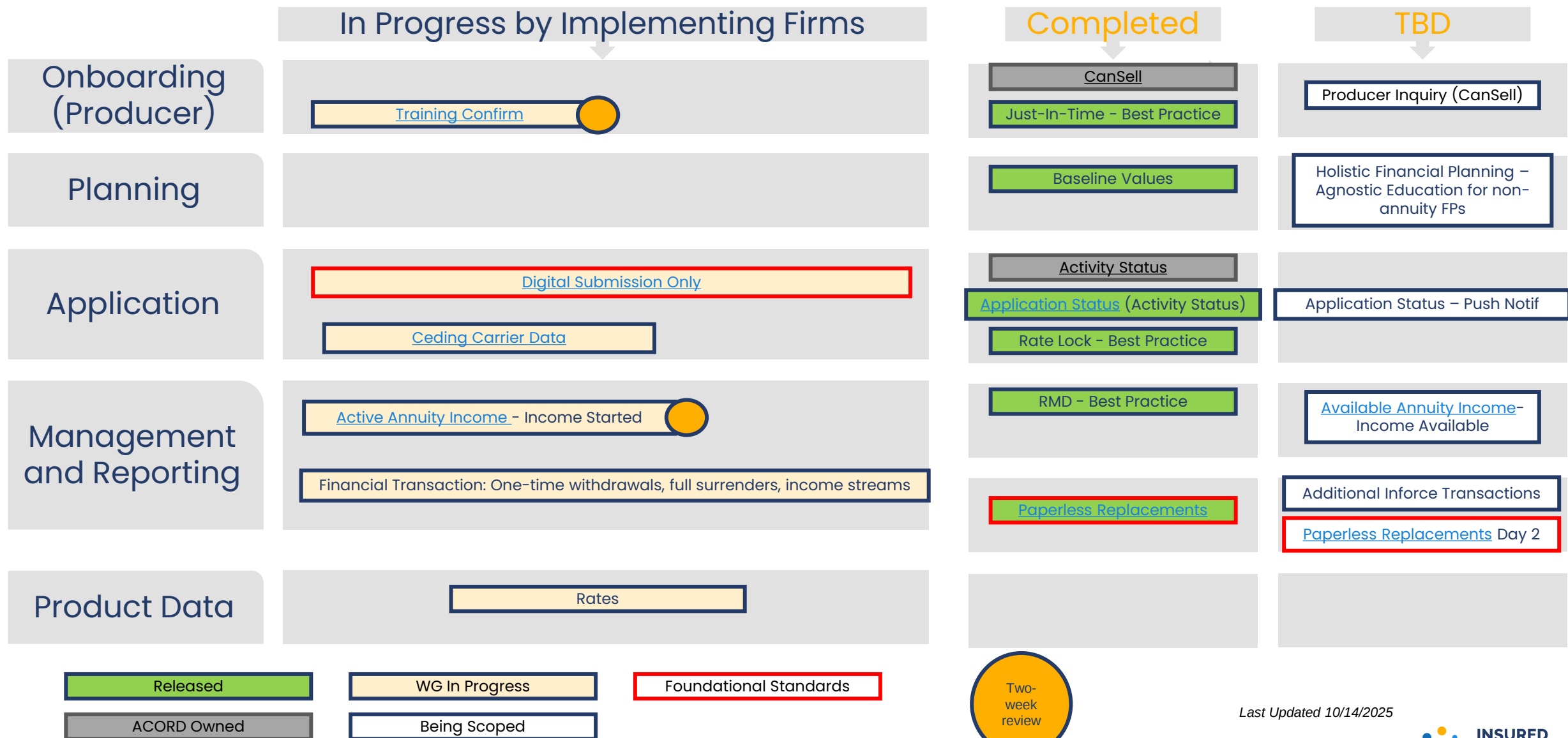


Capability Roadmap



Inforce Roadmap

Plans by Implementing Firms

Financial Transactions: JPMC, DTCC, Zinnia, Brighthouse, Athene, Corebridge, Global Atlantic, FIG, Porch Edward Jones

DTCC Financial Transactions

Fund Transfer, Reallocations, Rebalance, Index Renewals

JPMC, Zinnia, DTCC, Morgan Stanley, Corebridge, Athene, Brighthouse, Porch, Edward Jones, FIG

Producer & Broker of Record Maintenance

Zinnia, DTCC, FIG, Porch, Raymond James, Edward Jones

Beneficiary Management

Fidelity, LUMA, Porch, Edward Jones

Inforce NIGO Resolution

Morgan Stanley, Brighthouse, Porch, Edward Jones

On Deck

Service Feature Edits

DTCC, Zinnia, Global Atlantic, Brighthouse, Porch, Edward Jones

SPDA Renewals

Fidelity, Porch, Edward Jones, Raymond James

Death Claims

Zinnia, DTCC, Global Atlantic, Porch, Edward Jones

Owner/Annuitant Edits

Morgan Stanley, Brighthouse, Zinnia, DTCC, Porch, Edward Jones

Policy Updates

Zinnia, DTCC, Porch, Edward Jones

Rider Edits

Zinnia, DTCC, Porch, Edward Jones

Advisory Fee Transactions

Porch, Allianz

Management / Reporting - Inforce

WG In Progress

Member Planned Timeline

DTCC Planned Implementation

Last Updated 9/8/2025