

# Accessing Penn Mutual's client portal

## Easily view and manage your life insurance policy at any time

We've made it easy for you to take full advantage of Penn Mutual's client portal, which serves as your gateway to everything you need to know about your policy — all in one place. Plus, the portal ensures the security and confidentiality of your policy details.

STEP

1

## Register for the portal

### If you purchased your policy through ACE, our digital life insurance buying experience:

- You've been automatically registered for the client portal.
- You can securely access the portal by logging in at **myaccount.pennmutual.com** with the credentials you set up during the ACE submission process.

### If you did not purchase your policy through ACE:

- You can still register for the client portal by visiting **myaccount.pennmutual.com** and clicking on the "Need an account? Register here" link.
- During the registration process, you'll need your:
  - Policy number
  - Date of birth
  - Social Security number



## Create Profile

Already registered? [Sign In](#)

Account

Personal

Policy

Contact

Verify

Choose Username \*

Email Address \*

Choose Password \*

Show

Confirm Password \*

Show

Back

Next

STEP  
2

## Explore what the portal offers

### Take a comprehensive look at your policy information, including:

- Policy values
- Riders and benefits
- Premiums
- Billing
- Transaction history
- Correspondence

### Easily access:

- Your financial professional's contact information
- Service forms
- Policy statements, letters, confirmations and original policy pages.<sup>1</sup>

### Actively manage your policy by:

- Paying premiums<sup>2</sup>
- Purchasing paid-up additions for whole life products
- Allocating premiums and transferring funds for variable life products
- Updating your address and contact information
- Updating your beneficiary information.

The screenshot displays the client portal interface. At the top, there is a navigation bar with a logo, 'My Financial Professional', 'Contact Us', and 'Forms'. On the right side of the navigation bar are 'My Profile' and 'Log Out'. Below the navigation bar, a green banner shows 'Guaranteed Term 10-15-20', 'Issue State: Pennsylvania', 'Years Active: 5', and 'Status: Active (inforce)'. Below the banner, there are three tabs: 'Insured John Penn', 'Owner John Penn', and 'Multiple Beneficiaries Jessica Penn +5'. A 'Print Summary' button is located on the right. The main content area is divided into two columns. The left column has three sections: 'Policy Values' showing 'Net Death Benefit' and 'Base Face Amount' both at '\$500,000.00'; 'Riders and Benefits' with a message 'There are no additional active riders and benefits on this policy' and 'Term Period 15 years'; and 'Recent Transactions' with a table header 'Description', 'Effective Date', and 'Amount'. The right column features a 'Make Payments' modal with a 'View Most Recent Bill' link. The modal contains a table with columns 'Payments' and 'Amount', showing 'Premium for 3 months' at '\$137.03' and a 'Total' of '\$137.03'. Below the table is a 'Choose Payment Account' dropdown menu set to 'Johns Account 2 - x1234'. At the bottom of the modal is a checkbox with the text 'By clicking "Pay", I authorize the payee to electronically debit my bank account for the amount(s) and date set forth above. I also attest I am the owner of the policy and bank account.' and two buttons: 'Pay' and 'Cancel'.

**For questions or to learn more about the client portal, please contact a Digital Experience representative at 1-800-523-0650, option 1.**

<sup>1</sup>Available for most policies issued since 2012.

<sup>2</sup>Policies on automatic payment are not available for online payment through the portal.