



**On-Demand** Insurance  
Solutions

**EBIX** EXCHANGE

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## WinFlex Web 'Client Results Summary Report'

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# WinFlex Web 'Client Results Summary Report'

Product: **Change**

Select Product:



Company:  
None Selected  
Product:  
None Selected  
Concept:

Click the Product 'Change' Button to Open the Product Selector

Clients:

Please select a company and product.

Select Product      Search for Product

### Select Company and Product

Company:	Product:	
AG - American General Life Companies	AG Secure Lifetime GUL	GUL/UL
	AG Secure Survivor GUL	GUL/UL/JOINT
Banner Life	AG Choice Index GUL	UL
BlueSky Life Insurance Company	Elite Global Plus	UL
ING Life	Elite Global Survivor	UL/JOINT
Lincoln Benefit Life	Elite Index	UL
Lincoln Financial Group	Elite Survivor Index	UL/JOINT
Metlife Investors	Elite UL	UL
Security Mutual Life of New York	Elite Transition UL	UL
Western Reserve Life	AG ROP Select-A-Term -2009	TERM
William Penn	AG ROP Select-A-Term -2010	TERM

**Get Underwriting**      **Create Client**

Product Notes:

[Sales Ideas & Marketing Materials](#)

FOR TERM CONVERSION AVAILABILITY, PLEASE CONTACT YOUR MARKETING DEPARTMENT

PRODUCT PURPOSE:  
Provides guaranteed death benefit coverage; flexibility to select the amount of coverage needed.

KEY BENEFITS:

Select a Carrier and Product

Click the 'Create Client' Button



# WinFlex Web 'Client Results Summary Report'

Client ▶ | View ▶ | Help ▶ | Load Clients | Client Manager | Home | Logout | Needs Analysis

Mark Krantz  
Thursday, July 19, 2012

WinFlex Web

Product: **Change**

Company:  
AG - American General Life  
Companie...

Product:  
AG Secure Lifetime GUL

Concept:  
<None>

Clients:

Save ▶ Copy Remove ▶ Sort ▶  
Calc Compare ▶ Composite Cancel

No.	Client Name/Company - Product
1	[Valued Client] AG - American General Life Companies AG Secure Lifetime GUL

Illustrate: **Calculate**

Insured Solve For Disbursements Policy Options Riders Reports Agent Info WF Output Options

Client Name: Valued Client

Sex: Male

Date of Birth:

Age: 45

Class: Preferred Non-Tobacco

Table Rating: None

Temporary Flat Extra: 0 More...

State of Issue: Pennsylvania

Backdate: No

Assumed Issue Date:

Assumed Month of Issue: 1

Create the Client Scenario

Question Help | Tab Help | Product Notes | What's New

Name of client or corporation.



# WinFlex Web 'Client Results Summary Report'

Client ▶ | View ▶ | Help ▶ | Load Clients | Client Manager | Home | Logout

WinFlex Web

Product: **Change**

Select Product:



Company:  
None Selected  
Product:  
None Selected  
Concept:

Click the Product 'Change' Button to Open the Product Selector

Clients:

Save ▶	Copy	Remove ▶	Sort ▶
Calc	Compare ▶	Composite	Cancel
<input type="checkbox"/> No.	Client Name/Company - Product		
<input type="checkbox"/> 1	<b>Valued Client</b> AG - American General Life Companies AG Secure Lifetime GUL		

Select Product      Search for Product

### Select Company and Product

Company:	Product:
AG - American General Life Companies	★ ING UL-GDB UL
Banner Life	★ ING IUL-GDB UL
BlueSky Life Insurance Company	★ ING GDBUL II UL
ING Life	★ ING IUL-Global Plus UL
Lincoln Benefit Life	★ ING IUL-Global UL
Lincoln Financial Group	★ ING indexed UL-CV UL
MetLife Investors	★ ING UL-CV UL
Security Mutual Life of New York	★ ING UL-ECV UL
Western Reserve Life	★ ING Protector UL 07 UL
William Penn	★ ING SUL-GDB UL/JOINT
	★ ING Strategic Accumulator SUL UL/JOINT

**Get Underwriting**      **Update Client**      **Copy/Add Client**

Product Notes:  
ING Universal Life-Guaranteed Death Benefit (ING UL-GDB) is designed to provide competitive premiums providing up to a lifetime death benefit guarantee when compared with whole life and other lifetime guarantee solutions. Quotes on ledgers for new policies will only show guaranteed values.  
Not available in all states.

Select Another Carrier and Product

Click the 'Copy/Add' Button

Repeat this Step until the Client List is Complete



# WinFlex Web 'Client Results Summary Report'

Client ▶ | View ▶ | Help ▶ | Load Clients | Client Manager | Home | Logout

WinFlex Web

Product: **Change**

Company:  
AG - American General Life  
Companie...

Product:  
AG Secure Lifetime GUL

Concept:  
<None>

Clients:

Save ▶ Copy Remove ▶ Sort ▶

**Calc** Compare ▶ Composite Cancel

No.	Client Name/Company - Product
<input checked="" type="checkbox"/>	1 [Valued Client] AG - American General Life Companies AG Secure Lifetime GUL
<input checked="" type="checkbox"/>	2 [Valued Client] ING Life - ING IUL-Global
<input checked="" type="checkbox"/>	3 [Valued Client] AG - American General Life Companies Elite Global Plus
<input checked="" type="checkbox"/>	4 [Valued Client] AG - American General Life Companies AG Select-a-Term March 2012
<input checked="" type="checkbox"/>	5 [Valued Client] ING Life - ING TermSmart-20 [10]

Illustrate: **Calculate**

Insured Solve For Disbursements Policy Options Riders Reports Agent Info WF Output Options

Client Name Valued Client

Sex Male

Date of Birth

45

Preferred Non-Tobacco

None

Temporary Flat Extra 0 More...

State of Issue Pennsylvania

Backdate No

Assumed Issue Date

Assumed Month of Issue 1

Check the Clients to Include in the Comparison and Click 'Calc'

Question Help | Tab Help | Product Notes | What's New

Name of client or corporation.



# WinFlex Web 'Client Results Summary Report'

Client | View | Help | Load Clients | Client Manager | Home | Logout

WinFlex Web

Product: **Change**

Company: ING Life

Product: ING TermSmart-20 [10]

Concept: <None>

Client Results Summary: **Edit** **Sort the Results**

Clients:

Save | Copy | Remove | Sort

Calc | Compare | Composite | Cancel

No. Client Name/Company - Product

- 1 [Valued Client]
  - AG - American General Life Companies
  - AG Secure Lifetime GUL
  - Messages
  - Snapshot**
  - Policy Info
  - Illustration Package
  - Client Results Summary**
- 2 [Valued Client]
  - ING Life - ING IUL-Global
  - Snapshot
  - Policy Info
  - Illustration Package
  - Forms
  - Client Results Summary

Client Results Summary											
Life	Name	Sex/ Age	Class	State	Company/ Product	Initial Death Benefit	Initial Annual Premium	Target Prem	Guaranteed Years/ Age	Premium Pay Years	Illus. Action
1	Valued Client	M/45	P	UT	AG - American General Life Companies AG Secure Lifetime GUL	1,000,000	7,094	9,020	87/132	76	
6	Valued Client	M/45	P	UT	Zurich American Life Insurance Company Zurich Guaranteed Death Benefit UL TERM	1,000,000	14,377	7,420	76/121	76	
4	Valued Client	Male/45	P	UT	AG - American General Life Companies AG Select-a-Term March 2012	1,000,000	1,434	N/A	51/96	20	
5	Valued Client	M/45	P	UT	ING Life ING TermSmart-20 [10]	1,000,000	1,458	N/A	21/66	20	
3	Valued Client	M/45	P	UT	AG - American General Life Companies Elite Global Plus	1,000,000	7,999	13,910	87/132	76	
2	Valued Client	M/45	P	UT	ING Life ING IUL-Global	1,000,000	8,787	18,000	81/126	76	

This report is for agent use only. These values are not guaranteed and actual results may be greater or less than those shown. These values are not valid unless accompanied or preceded by a source ledger for each policy illustrated. Refer to the source ledger for guaranteed elements and other important information.

Edit Clients

Results Displayed by Product Type

View the Compliant Illustration Packages

Each Client Report Tree has a Link to the 'Snapshot' Ledger Report

Each Client Report Tree has a Link Back to the 'Client Results Summary'

Drop a Ticket