



**On-Demand** Insurance  
Solutions

**EBIX** EXCHANGE

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WinFlex Web 'Electronic Application'

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# WinFlex Web Electronic Application

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 Electronic Application

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 Electronic Application

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 Electronic Application

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

<input checked="" type="checkbox"/>	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 Electronic Application

Product: [Change](#)

Client Results Summary: [Edit](#)

**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	<b>Valued Client</b> AG - American General Life Companies AG Secure Lifetime GUL Snapshot Policy Info Illustration Package eAPPLY Client Results Summary
2	Valued Client ING Life - ING IUL-Global
3	Valued Client AG - American General Life Companies Elite Global Plus

### 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
GUL/UL												
2	Valued Client	M/45	P	PA	AG - American General Life Companies AG Secure Lifetime GUL	1,000,000	16,219	9,020	87/132	10		<a href="#">eApply</a>
6	Valued Client	M/45	P	AL	Zurich American Life Insurance Company Zurich Guaranteed Death Benefit UL	1,000,000	18,613	7,420	76/121	10		
TERM												
4	Valued Client	Male/45	P	AL	AG - American General Life Companies AG Select-a-Term March 2012	1,000,000	944	N/A	51/96	10		<a href="#">eApply</a>
5	Valued Client	M/45	P	AL	ING Life ING TermSmart-20 [10]	1,000,000	1,458	N/A	51/96	50		
UL												
1	No Name	M/45	P	PA	ING Life ING IUL-Global	1,000,000	10,000	18,000	81/126	76		
3	Valued Client	M/45	P	AL	AG - American General Life Companies Elite Global Plus	1,000,000	14,369	13,910	87/132	10		

Drop a Ticket

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.



# WinFlex Web Electronic Application

**LIFESPEED**  
A Product of EBIXEXCHANGE

Status of Business **New Application**

Application: AGLC0000025591 Carrier : American General Life Insurance Company  
Application Wizard: Product Selection Product : AG Secure Lifetime GUL

View Details Comment Validate Submit Save Print/Sign Attach Previous Next

**Product Selection**  
 Policy Configuration  
 Primary Insured  
 Payment  
 Agent Report

Please note that all fields marked with \* are mandatory.

**Product Selection**

Application State*	Pennsylvania
Product Type*	Universal Life
Insurance Company*	American General Life Insurance Company
Product*	AG Secure Lifetime GUL

**Agent Information**

	First Name	Last Name	Agent Code	Commission Split %	
Writing Agent*	Agent	One			<input type="button" value="Add"/>

Illustration Information is Pre-filled into the Electronic Application

Click 'Next' to Continue with the Application Wizard

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Status of Business

New Application

Application: AGLC0000025591  
Application Wizard: Product Selection

**Complete the Application Requirements**

Carrier : American General Life Insurance Company  
Product : AG Secure Lifetime GUL

- Product Selection
- Policy Configuration
- Valued Client
  - Financial Details
  - Beneficiaries
- Payment
- Agent Report

View Details | Comment | Validate | Submit | Save | Print/Sign | Attach | Previous | Next

Please note that all fields marked with \* are mandatory.

**Product Selection**

Application State\*

Product Type

Insurance Comp

Product\*

**Agent Informa**

You have completed the Application for AGLC0000025591. You may select "OK" to return to the application screen, "Validate" to validate the application for errors, or "Save" to save the application and return to the "Status of Business" page.

**Validate or Save a Draft of the Application**

	First Name	Last Name	Agent Code	Commission Split %	
Writing Agent*	<input type="text" value="Agent"/>	<input type="text" value="One"/>	<input type="text" value="12345"/>	<input type="text" value="100"/>	<input type="button" value="Add"/>

Previous | Next





# WinFlex Web Electronic Application

Product:

- Calc
- Pending eApps (LifeSpeed)**
- Input
- Composite
- Multipan Presentation
- VitalSigns Report
- Settings

<None>

View Application Status from WinFlex

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

Client Name:

Sex: Male

Date of Birth:

Age: 45

Class: Preferred Plus

Table Rating: None

Temporary Flat Extra:  More

State of Issue: Pennsylvania

Backdate: No

Assumed Issue Date:

Assumed Month of Issue: 1

Clients:

Save   Copy   Remove   Sort

Calc   Compare   Composite   Cancel

No.	Client Name/Company - Product
1	No Name AG - American General Life Companies AG Secure Lifetime GUL
2	No Name AG - American General Life Companies AG Select-a-Term March 2012
3	No Name Banner Life - Life Choice UL
4	No Name Banner Life - OPTerm

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

Name of client or corporation.



# WinFlex Web Electronic Application

Welcome, Mark Krantz | [Logout](#) [Change Password](#) | 02:05:31 PM

**LIFESPEED**  
A Product of EBIXEXCHANGE

Status of Business New Application

**Status of Business**

ValidateSubmitEditViewCommentPrint/SignDeleteApproveDeclineSuspendAttach

Please select the Search Options, enter Search Criteria, and click on the Search button.

**Perform Application Activities**

Search Option: Advisor Name Search Criteria:  Search Advanced Search Customize

Owner	Owner	Application	Carrier	Product	Face	Updated	Carrier	Application #	Advisor	Insured	Insured	State	AgentId	Process
Mark Krantz		Submitted	Banner life	OPTerm	\$250,000	Jun 28 2012 1:...		BLC00000025241	Mark Krantz	Mark Krantz		California	ABD	Application
		Draft	Banner life	Life Choice UL	\$250,000	May 24 2012 11:...		BLC00000024183	Mark Krantz	Mark		Alabama	12345	Application
		Draft	Banner life	Life Choice UL	\$250,000	May 15 2012 1:...		BLC00000023877	Mark Krantz	Mark		Alabama	mrk	Application
Tom Rios		Submitted	Banner life	Life Choice UL	\$250,000	May 8 2012 4:...		BLC00000023639	Mark Krantz	Tom Rios		Alabama	12345	Application
	XXX-XX-6789	BGA Review	American Genera...	AG Secure Lifet...	\$1,000,000	Jul 23 2012 4:...		AGLC00000025642	Mark Krantz	Valued Client	XXX-XX-6789	Utah	12345	Application
Valued Client	XXX-XX-6789	Ready to Valida...	American Genera...	AG Secure Lifet...	\$1,000,000	Jul 23 2012 2:...		AGLC00000025591	Mark Krantz	Valued Client	XXX-XX-6789	Pennsylvania	12345	Application

Show number of results per page:  Go Page 1 of 1 Jump to Page:  Go

Add New

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Perform Application Activities

View Application Status