

# WinFlex 6.5 Case Design Overview

WinFlex Dashboard with Short Cut links, Carrier What's New, Help and User Stats

**WinFlex Dashboard**

Week | TOTAL WINFLEX RUNS: 289,662 | AVG DEATH BENEFIT: \$2,451,054 | AVG PREMIUM: \$103,685

**Shortcuts**

- Illustrations
- Express Illustrations
- Client Manager
- Agent Manager
- Group Manager
- User Profile
- eApp Status

**WinFlex Stats**

**Total Runs by Product Type**

Product Type	Count
UL	345,509
VAR	29,336
GUL/UL	29,209
TERM	28,756
UL/JOINT	26,877
PAR	12,194

**What's New by Carrier**

- Protective - JPMC
- Protective Life - Edward Jones Life Consultant
- North American Company for Life and Health
- Prudential - JP Morgan Chase
- corebridge Financial - AG - American General
- corebridge Financial - AG - JPMC
- John Hancock Insurance - John Hancock

**Spotlight**

**AnnuityNet Express** - The premier order-entry platform for annuity transactions. [Learn More](#)

**Spotlight**

**DTCC STP to Expand Annuities Distribution**

**Help**

- WinFlex 6.5 Walk Through Video
- Case Design Overview
- Express Illustrations
- Technical Support

If you're a first time user, click here to learn how to get started using WinFlex Web.

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Client Editor opening 'What would you like to do?' Menu and Carrier What's New

WinFlex is now part of Zinnia's suite of insurance solutions. [Learn more](#)

**Getting Started with WinFlex Web**

**What would you like to do?**

- Start a New Case
- Load a Saved Case
- Use Last Case
- Manage Cases

**Spotlight**

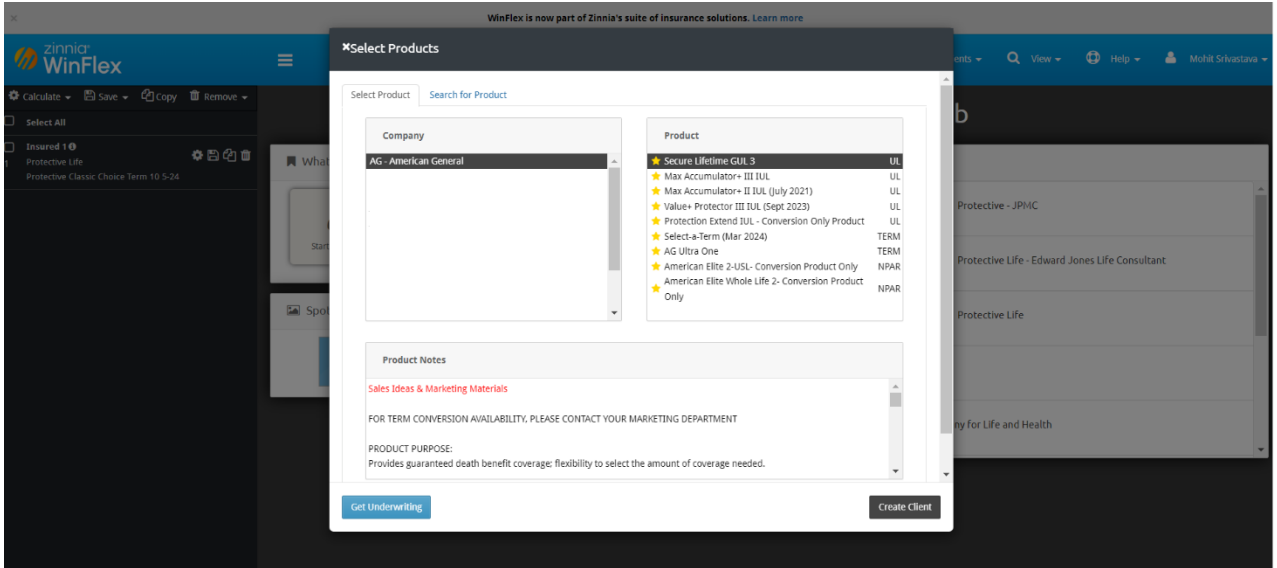
Spreadsheets getting you down? Create a proposal in minutes. [LEARN MORE](#)

**What's New by Carrier**

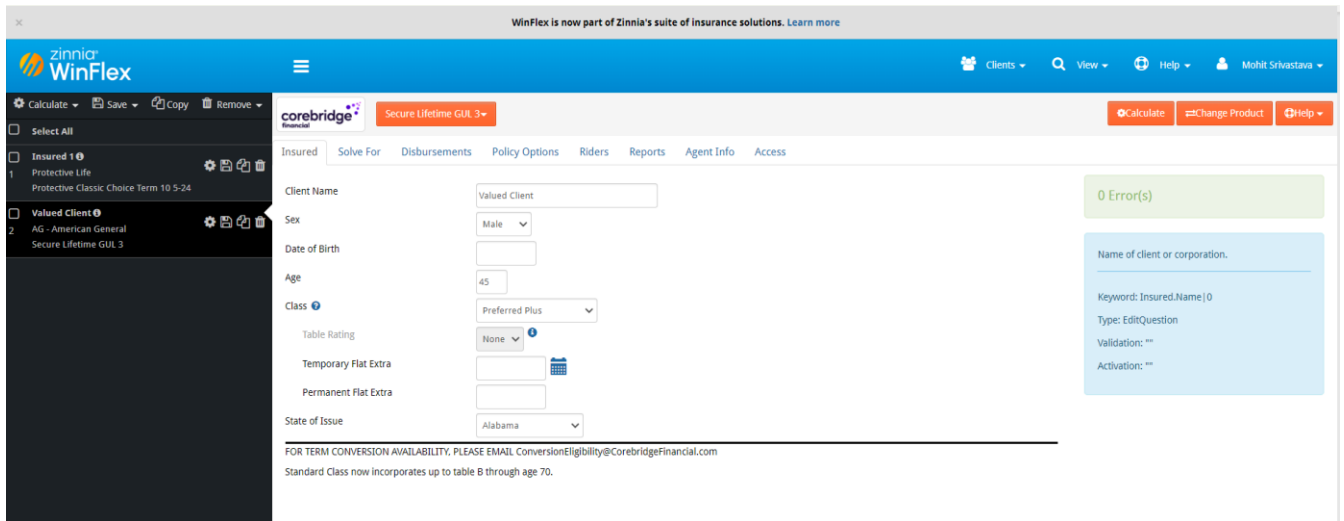
- Protective - JPMC
- Protective Life - Edward Jones Life Consultant
- Protective Life
- Nationwide - JPMC
- North American Company for Life and Health

# WinFlex 6.5 Case Design Overview

Select Products and Search for Products Dialog with Pre-underwriting link



## Client Editor Notebook for Building Cases



# WinFlex 6.5 Case Design Overview

## Summary Page with Client List, eApply and Compliant Illustrations

The screenshot shows the WinFlex software interface. On the left is a sidebar with a 'Valued Client' list containing four entries for 'AG - American General Secure Lifetime GUL 3'. The main area is titled 'Illustration Results' and shows a 'Summary' table. The table has columns for Life, Name, Sex/Age/Class, Initial Death Benefit, Initial Annual Premium, Target Premium, Guaranteed Years, Premium Pay Years, Illustration, and eApply. There are four rows of data, each representing a client. Below the table is a disclaimer: '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.'

Life	Name	Sex/Age/Class	Initial Death Benefit	Initial Annual Premium	Target Premium	Guaranteed Years	Premium Pay Years	Illustration	eApply
UL									
1	Valued Client AG - American General Secure Lifetime GUL 3	M/45/SP AL	1,000,000	9,000	6,700	43	44		
2	Valued Client AG - American General Secure Lifetime GUL 3	M/45/SP AL	1,000,000	14,000	6,700	86	76		
3	Valued Client AG - American General Secure Lifetime GUL 3	M/45/SP AL	1,000,000	20,000	6,700	86	76		
4	Valued Client AG - American General Secure Lifetime GUL 3	M/45/SP AL	1,000,000	12,000	6,700	86	76		

## New Snapshot Bar Graph Report with Year by Year Premium, Cash Value and DB Values

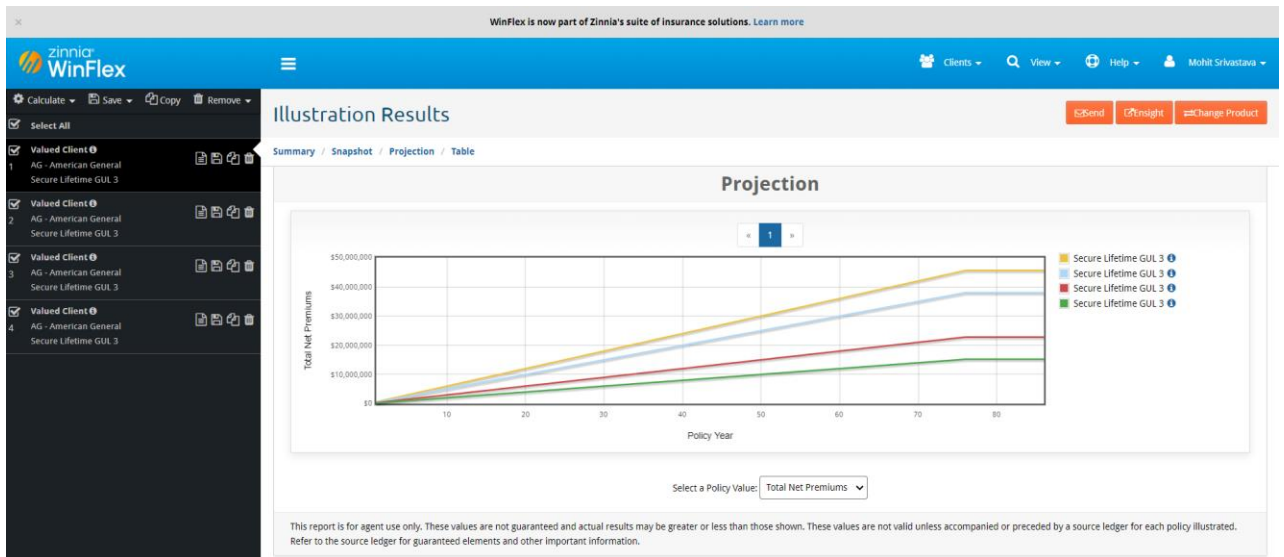
The screenshot shows the WinFlex software interface with the 'Snapshot' bar graph report. The graph displays three data series: Total Net Premiums (yellow), Net Surrender Value (blue), and Net Death Benefit (red) over a period of 85 years. The x-axis is labeled 'Select a Policy Year' and ranges from 1 to 85. The y-axis represents dollar amounts from \$0 to \$1,250,000. The data points for the first four years are as follows:

Policy Year	Total Net Premiums	Net Surrender Value	Net Death Benefit
1	\$600,000	\$411,873	\$1,000,000
10	\$500,000	\$330,124	\$1,000,000
20	\$300,000	\$166,625	\$1,000,000
30	\$200,000	\$84,875	\$1,000,000

Below the graph is a legend and a 'Select a Policy Year' input field set to '1'. A disclaimer at the bottom states: '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 6.5 Case Design Overview

New Projection Line Graph Report with Year by Year Premium, Cash Value and DB Values.



# WinFlex 6.5 Case Design Overview

New Table Numeric Report with Side by Side Premium, Cash Value and DB Values

zinnia WinFlex Illustration Results

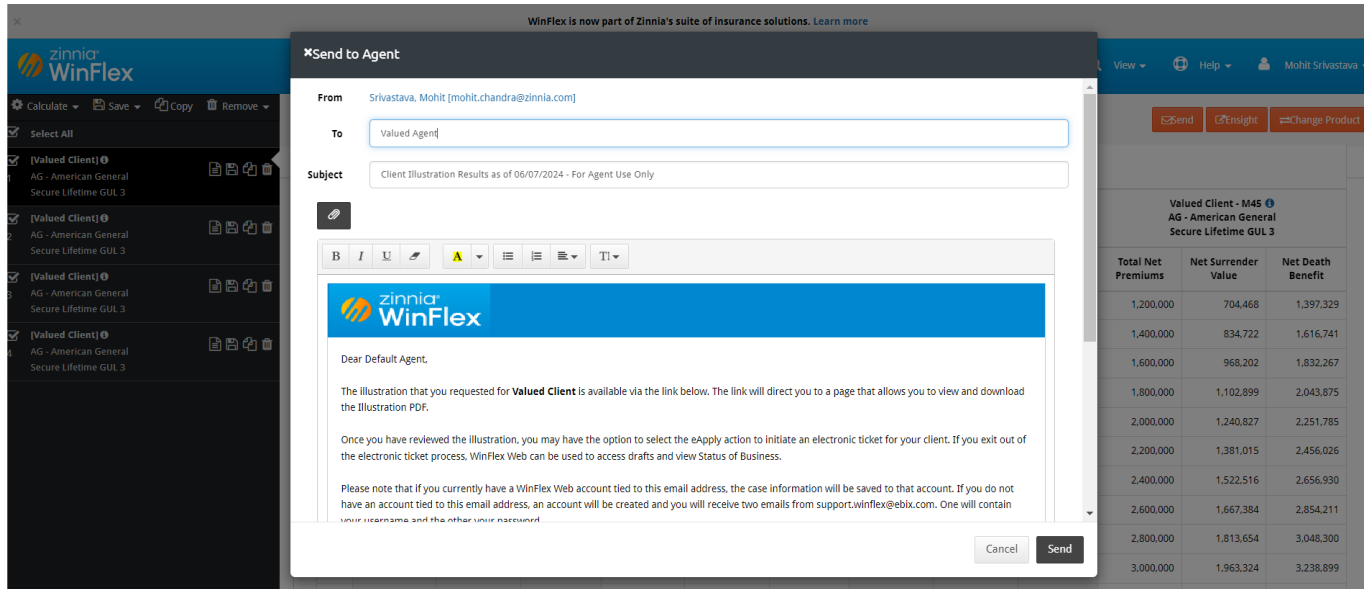
Summary / Snapshot / Projection / Table

Table

Year	Valued Client - M45 AG - American General Secure Lifetime GUL 3			Valued Client - M45 AG - American General Secure Lifetime GUL 3			Valued Client - M45 AG - American General Secure Lifetime GUL 3			Valued Client - M45 AG - American General Secure Lifetime GUL 3		
	Total Net Premiums	Net Surrender Value	Net Death Benefit	Total Net Premiums	Net Surrender Value	Net Death Benefit	Total Net Premiums	Net Surrender Value	Net Death Benefit	Total Net Premiums	Net Surrender Value	Net Death Benefit
1	600,000	411,873	1,000,000	500,000	330,124	1,000,000	300,000	166,625	1,000,000	200,000	84,875	1,000,000
2	1,200,000	862,772	1,831,071	1,000,000	698,117	1,493,742	600,000	368,524	1,000,000	400,000	203,224	1,000,000
3	1,800,000	1,322,782	2,722,474	1,500,000	1,073,730	2,221,257	900,000	575,338	1,218,243	600,000	325,132	1,000,000
4	2,400,000	1,791,027	3,598,011	2,000,000	1,456,064	2,935,823	1,200,000	785,845	1,610,866	800,000	449,659	1,000,000
5	3,000,000	2,266,634	4,458,122	2,500,000	1,844,223	3,637,798	1,500,000	999,101	1,996,572	1,000,000	575,444	1,173,831
6	3,600,000	2,751,706	5,302,844	3,000,000	2,240,289	4,327,215	1,800,000	1,217,152	2,375,376	1,200,000	704,468	1,397,329
7	4,200,000	3,244,214	6,132,128	3,500,000	2,642,240	5,004,030	2,100,000	1,437,985	2,747,255	1,400,000	834,722	1,616,741
8	4,800,000	3,746,145	6,946,738	4,000,000	3,052,066	5,668,869	2,400,000	1,663,594	3,112,552	1,600,000	968,202	1,832,267
9	5,400,000	4,255,463	7,746,548	4,500,000	3,467,736	6,321,628	2,700,000	1,891,962	3,471,210	1,800,000	1,102,899	2,043,875
10	6,000,000	4,774,223	8,532,396	5,000,000	3,891,295	6,962,992	3,000,000	2,125,114	3,823,605	2,000,000	1,240,827	2,251,785
11	6,600,000	5,301,530	9,304,383	5,500,000	4,321,830	7,593,042	3,300,000	2,362,098	4,169,782	2,200,000	1,381,015	2,456,026
12	7,200,000	5,836,591	10,063,765	6,000,000	4,758,508	8,212,805	3,600,000	2,602,005	4,510,305	2,400,000	1,522,516	2,656,930
13	7,800,000	6,381,605	10,809,458	6,500,000	5,203,493	8,821,395	3,900,000	2,846,927	4,844,689	2,600,000	1,667,384	2,854,211
14	8,400,000	6,934,699	11,543,090	7,000,000	5,654,889	9,420,141	4,200,000	3,094,919	5,173,664	2,800,000	1,813,654	3,048,300
15	9,000,000	7,497,875	12,263,538	7,500,000	6,114,696	10,008,127	4,500,000	3,347,983	5,496,725	3,000,000	1,963,324	3,238,899

# WinFlex 6.5 Case Design Overview

Agent Email that sends Comparison with Attachments and Illustration Package.



The screenshot displays the WinFlex 6.5 user interface. A 'Send to Agent' dialog box is open, showing the following details:

- From:** Srivastava, Mohit [mohit.chandra@zinnia.com]
- To:** Valued Agent
- Subject:** Client Illustration Results as of 06/07/2024 - For Agent Use Only

The email body contains the following text:

Dear Default Agent,

The Illustration that you requested for **Valued Client** is available via the link below. The link will direct you to a page that allows you to view and download the Illustration PDF.

Once you have reviewed the illustration, you may have the option to select the eApply action to initiate an electronic ticket for your client. If you exit out of the electronic ticket process, WinFlex Web can be used to access drafts and view Status of Business.

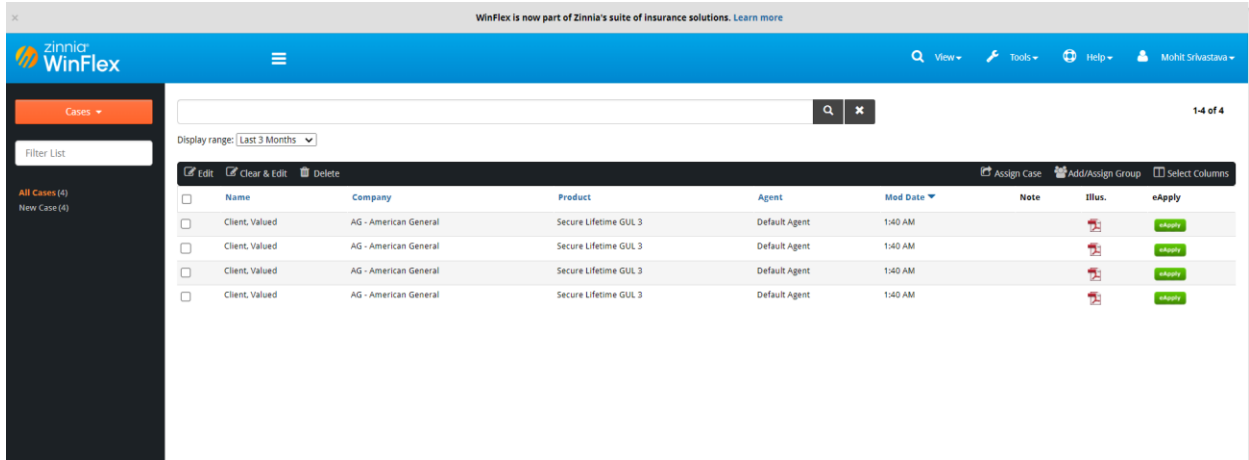
Please note that if you currently have a WinFlex Web account tied to this email address, the case information will be saved to that account. If you do not have an account tied to this email address, an account will be created and you will receive two emails from support.winflex@ebix.com. One will contain your username and the other your password.

At the bottom right of the interface, a table displays financial data for a 'Valued Client - M45 AG - American General Secure Lifetime GUL 3':

Total Net Premiums	Net Surrender Value	Net Death Benefit
1,200,000	704,468	1,397,329
1,400,000	834,722	1,616,741
1,600,000	968,202	1,832,267
1,800,000	1,102,899	2,043,875
2,000,000	1,240,827	2,251,785
2,200,000	1,381,015	2,456,026
2,400,000	1,522,516	2,656,930
2,600,000	1,667,384	2,854,211
2,800,000	1,813,654	3,048,300
3,000,000	1,963,324	3,238,899

# WinFlex 6.5 Case Design Overview

Newly Designed Client Manager for Saving and Retrieving Cases



WinFlex is now part of Zinnia's suite of insurance solutions. Learn more

zinnia WinFlex

View Tools Help Mohit Srivastava

Cases

Filter List

All Cases (4)  
New Case (4)

Display range: Last 3 Months

1-4 of 4

<input type="checkbox"/>	Name	Company	Product	Agent	Mod Date	Note	Illus.	eApply
<input type="checkbox"/>	Client, Valued	AG - American General	Secure Lifetime GUL 3	Default Agent	1:40 AM			<a href="#">eApply</a>
<input type="checkbox"/>	Client, Valued	AG - American General	Secure Lifetime GUL 3	Default Agent	1:40 AM			<a href="#">eApply</a>
<input type="checkbox"/>	Client, Valued	AG - American General	Secure Lifetime GUL 3	Default Agent	1:40 AM			<a href="#">eApply</a>
<input type="checkbox"/>	Client, Valued	AG - American General	Secure Lifetime GUL 3	Default Agent	1:40 AM			<a href="#">eApply</a>

Edit  
  Clear & Edit  
  Delete  
  Assign Case  
  Add/Assign Group  
  Select Columns