

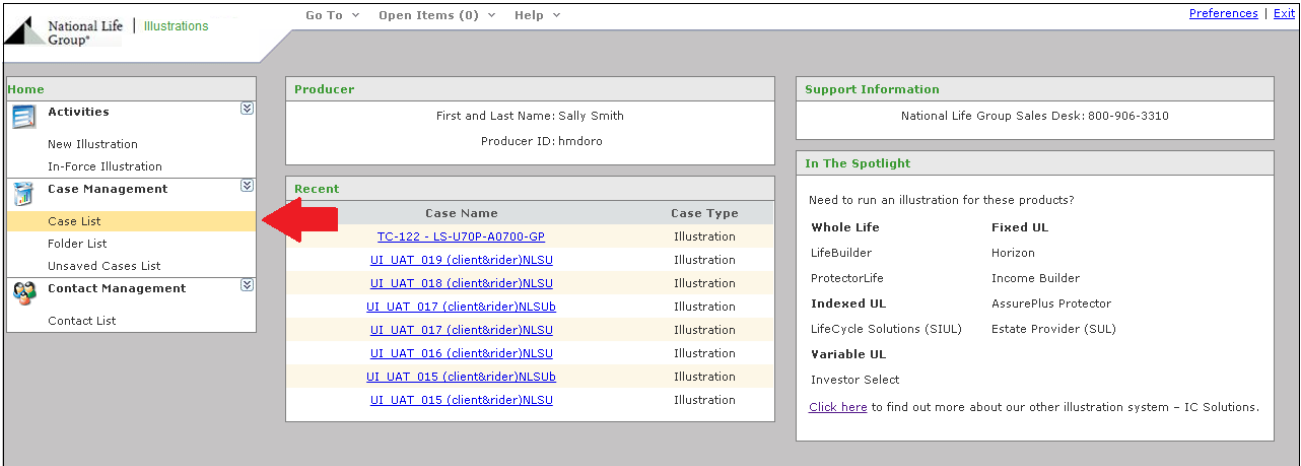
CONVERTING FLEXLIFE ILLUSTRATIONS

Once the FlexLife II products have been implemented, you will have 30 days to access your original saved FlexLife cases. After 30 days your FlexLife cases will no longer be available.

Follow the instructions below to convert your saved FlexLife cases to FlexLife II.

STEP 1

Click on **Case List** from Case Management on Illustration Homepage



The screenshot shows the National Life Illustrations application interface. The left sidebar contains a navigation menu with sections: Home, Activities (New Illustration, In-Force Illustration), Case Management (Case List, Folder List, Unsaved Cases List), and Contact Management (Contact List). The 'Case List' option is highlighted with a red arrow. The main content area is divided into three panels: 'Producer' (First and Last Name: Sally Smith, Producer ID: hmdoro), 'Recent' (a table of cases), and 'Support Information' (National Life Group Sales Desk: 800-906-3310). The 'In The Spotlight' section lists product types: Whole Life (LifeBuilder, ProtectorLife), Indexed UL (LifeCycle Solutions (SIUL)), and Variable UL (Investor Select). A link is provided to find out more about other illustration systems.

Case Name	Case Type
TC-122 - LS-U70P-A0700-GP	Illustration
UI_UAT_019 (client&rider)NLSU	Illustration
UI_UAT_018 (client&rider)NLSU	Illustration
UI_UAT_017 (client&rider)NLSUB	Illustration
UI_UAT_017 (client&rider)NLSU	Illustration
UI_UAT_016 (client&rider)NLSU	Illustration
UI_UAT_015 (client&rider)NLSUB	Illustration
UI_UAT_015 (client&rider)NLSU	Illustration

STEP 2

Identify your saved FlexLife cases

Case Name	Folder Name	Last Updated	Product	Export
CE-019-FlexLife	My Cases	12/17/2012 12:57:19 PM	LSW FlexLife	Export
CE-028-FlexLife	My Cases	12/17/2012 12:57:25 PM	LSW FlexLife	Export
CE-032-FlexLife	My Cases	12/17/2012 12:57:30 PM	LSW FlexLife	Export
CE-033-FlexLife	My Cases	12/17/2012 12:57:41 PM	LSW FlexLife	Export
CE-036-FlexLife	My Cases	12/17/2012 12:57:47 PM	LSW FlexLife	Export
CE-074-FlexLife	My Cases	12/17/2012 12:57:52 PM	NL FlexLife	Export
CE-076-FlexLife	My Cases	12/17/2012 12:57:58 PM	NL FlexLife	Export
CE-077-FlexLife	My Cases	12/17/2012 12:58:08 PM	LSW FlexLife	Export
CE-078-FlexLife	My Cases	12/17/2012 12:58:16 PM	NL FlexLife	Export
CE-079-FlexLife	My Cases	12/17/2012 12:58:25 PM	LSW FlexLife	Export
CE-084-FlexLife	My Cases	12/17/2012 12:58:33 PM	NL FlexLife	Export
CE-085-FlexLife	My Cases	12/17/2012 12:58:41 PM	LSW FlexLife	Export
CE-088-FlexLife	My Cases	12/17/2012 12:58:49 PM	NL FlexLife	Export
CE-089-FlexLife	My Cases	12/17/2012 12:58:58 PM	LSW FlexLife	Export
CE-096-FlexLife	My Cases	12/17/2012 12:59:09 PM	NL FlexLife	Export

Case Name	Folder Name	Last Updated	Product	Export
CE-019-FlexLife	My Cases	12/17/2012 12:57:19 PM	LSW FlexLife	Export
CE-028-FlexLife	My Cases	12/17/2012 12:57:25 PM	LSW FlexLife	Export
CE-032-FlexLife	My Cases	12/17/2012 12:57:30 PM	LSW FlexLife	Export
CE-033-FlexLife	My Cases	12/17/2012 12:57:41 PM	LSW FlexLife	Export

STEP 3
Open desired FlexLife case to convert to FlexLife II

STEP 4

Once cases has loaded, select the **Copy To** feature

National Life Insurance Company | Illustrations

Male | Age 49 | Standard NT

Run Reports | Save | Save As | Close | **Copy To** | InsMark | Show Alerts

Issue State: Vermont

Insured Information

First Name: The [Select Contact](#)

Middle Name: [Remove Contact](#)

Last Name: Client

Suffix: [v]

Gender: Male

Birth Date: 11/16/1967

Issue Age: 49

Summary Values

Statutory Values	
Minimum Premium:	\$902.16
Target Premium:	\$2,058.00
MEC Premium (7-Pay):	\$5,348.00
Guideline Level:	\$2,311.00

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STEP 5

Select product which you would like to convert your FlexLife product to

Product Name	Description
LSW FlexLife	LSW FlexLife Indexed Universal Life
NL FlexLife	NL FlexLife Indexed Universal Life
FlexLife II	FlexLife II Indexed Universal Life
NL FlexLife II	NL FlexLife II Indexed Universal Life
SecurePlus Provider	LSW SecurePlus Provider Indexed Universal Life
SecurePlus Advantage 79	LSW SecurePlus Advantage 79 IUL(Section 79 Plans)
Ultra Select	NL Ultra Select IUL (Section 79 Plans)

STEP 6

Once case has copied, select the **Save** feature to complete the converting process.

Male | Age 49 | Verified Standard NT

Issue State: Colorado

First Name: The [Select Contact](#)

Middle Name: [Remove Contact](#)

Last Name: Client

Suffix:

Gender: Male

Birth Date: 11/16/1967

Issue Age: 49

Statutory Values	
Minimum Premium:	\$1,008.24
Target Premium:	\$2,130.00
MEC Premium (7-Pay):	\$5,348.00
Guideline Level:	\$2,401.00

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