

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

Hom	•		Producer		Support Information		
_	Activities	*	First and Last Name: Sally Smi	41-		Creve Calas Dasky 800, 006, 2210	
3				ui	National Life Group Sales Desk: 800-906-3310		
	New Illustration		Producer ID: hmdoro				
	In-Force Illustration				In The Spotlight		
đ	Case Management	8	Recent		Need to run an illustration fo	r these products?	
-	Case List		Case Name	Case Type	Whole Life	Fixed UL	
	Folder List		TC-122 - LS-U70P-A0700-GP	Illustration			
	Unsaved Cases List		UI UAT 019 (client&rider)NLSU	Illustration	LifeBuilder	Horizon	
	Contact Management	*	UI UAT 018 (client&rider)NLSU	Illustration	ProtectorLife	Income Builder	
			UI_UAT_017 (client&rider)NLSUb	Illustration	Indexed UL	AssurePlus Protector	
	Contact List		UI UAT 017 (client&rider)NLSU	Illustration	LifeCycle Solutions (SIUL)	Estate Provider (SUL)	
			UI UAT 016 (client&rider)NLSU	Illustration	Variable UL		
			UI_UAT_015 (client&rider)NLSUb	Illustration	Investor Select		
			UI UAT 015 (client&rider)NLSU	Illustration	Click here to find out more a	bout our other illustration system -	

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Identify your saved FlexLife cases

Case Management								
earch for:	: Case Name 🔻 contains	<i>#</i> A						
6	Move Cases 🗸 📑 Copy Cases 🗸	🚰 Assign Cases	🗙 Delete Cases 📑 Import Case					
	Case Name	Folder Name	Last Updated	Product				
	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			
	on one distriction	M. A	10/12/0010 10:50:10 011		E			

STEP 3				A	agement Case Name 🔻 contains	Case Mana Search for: [
Open desired		Product	X Delete Cases 📑 Import Case	🚰 Assign Cases <u>Folder Name</u>	Move Cases 💿 📭 Copy Cases	1 2 1
FlexLife case to convert to	Export Export	LSW FlexLife	12/17/2012 12:57:19 PM	My Cases My Cases	CE-019-FlexLife	
FlexLife II	Export	LSW FlexLife	12/17/2012 12:57:30 PM	My Cases	<u>CE-032-FlexLife</u> CE-033-ElexLife	

STEP 4

Once cases has loaded, select the Copy To feature

National Life	tions	Go To Y Open Items (1) Y Help Y Pref	ferences Exit
Group*		Male Age 49 Standard NT Run Reports Save Save As Close Copy To InsMark	Show Alerts
CE-019-FlexLife		Illustration	
LSW FlexLife	8	Issue State: Vermont	
Client Information			
Death Benefit and Fund	ding		
Riders		Insured	
Interest Rates		Insured Information	
Quick ¥iew		First Name: The Select Contact	
Reports		Middle Name: Remove Contact	
		Last Name: Client	
		Suffix:	
Summary Values			
Statutory Values		Gender: Male 🔻	
Minimum Premium:	\$902.16	Birth Date: 11/16/1967	
Target Premium:	\$2,058.00	Issue Age: 49	
MEC Premium (7-Pay):	\$5,348.00	Risk Information	
Guideline Level:	\$2,311.00		

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STEP 5

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

Source Information				
	Issue State: Colorado 🔹			
	Product Type: Indexed Universal Life 🔹			
:	Sales Concept: Basic Illustration			
Product Selection				
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.

National Life Illustrations	Go 1	°o ∨ Open Items (2) ∨ Help ∨			Preferences Exit
Group*	Male	Age 49 Verified Standard NT	Run Reports Sa	ve <u>Save As</u> <u>Close</u> <u>Copy To</u> <u>InsMark</u>	Show Alerts
Untitled Case	Illust	ration			6
💕 FlexLife II 🗵			Issue State: Colorado		
Client Information					19
Death Benefit and Funding	Insur	ed			
Riders		Insured Information			
Interest Rates			First Name: The	Select Contact	
Quick View	-		Middle Name:	Remove Contact	
Reports			Last Name: Client		
	1		Suffix:		
Summary Values			Gender: Male 🔻		
Statutory Values			Birth Date: 11/16/1967 🎫		
Minimum Premium: \$1,008.24			Issue Age: 49		
Target Premium: \$2,130.00			15500 (Age)		
MEC Premium (7-Pay): \$5,348.00		Risk Information			
Cuidalina Laualu #2.401.00					

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