

RUN INFORCE WEB ILLUSTRATIONS 24 x 7

Did you know that you can run inforce illustration for Universal Life and LifeBuilder Policies on the National Life website? (For Ultra, Uniflex and Paragon products please contact the Home Office)

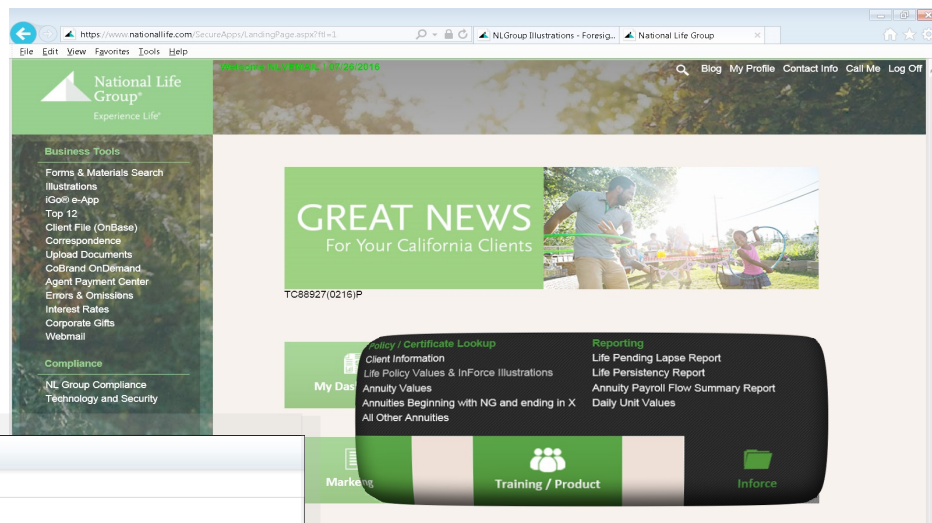
How to generate an illustration

STEP 1

Log into the Agent Portal

STEP 2

Hover the **Inforce** folder, click on the **Life Policy Values & Inforce Illustrations** option.



STEP 3

Enter either the Policy Number or Customer's Name.

Life Policy Values & In-force Illustrations

Policy Number Search | Name Search

Policy Number: GO

Enter a part of, or the entire policy number.
(A minimum of 6 digits must be entered.)

Life Policy Values & In-force Illustrations

Policy Number Search | Name Search

Insured / Annuitant Name

First Name: Last Name: GO

Owner Info

Corporate Individual

Name: GO

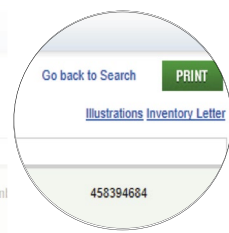
Enter the beginning of, or the entire corporate name.
Periods and commas cannot be used.
(Entering the last name is mandatory for this search. To narrow your search you can enter the first name as well.)

Life Policy Values & In-force Illustrations

Policy Information: Life Corporate View Customer View

Basic Info

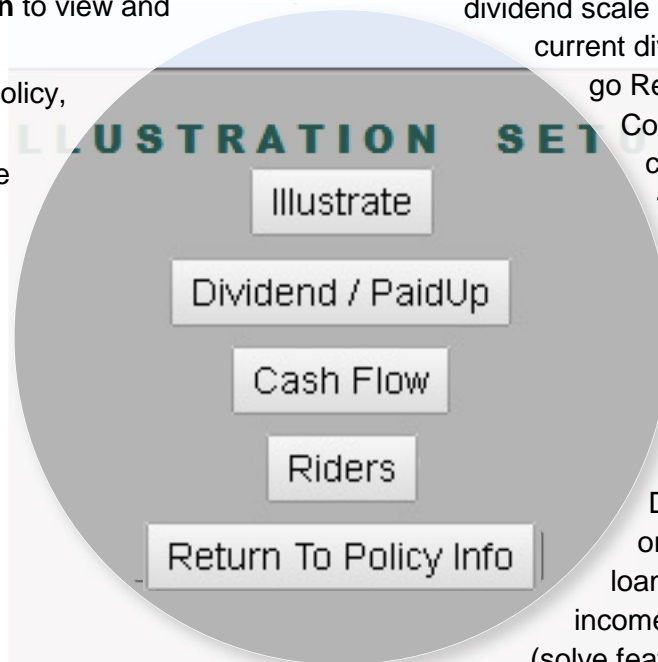
Servicing Representative:	KSCGZG XRPHTVNC-81876	Agency/Broker Dealer:	NEW YORK CITY-034	Policy Number:	458394684
Owner:	KSCGZG D PXGHTQF0 ZU				
Address:	542 ΔSVPTJ W7 # 9				



STEP 4
Select the **Illustrations** link

Inforce Web Illustrations (LifeBuilder)

To run an “As Is” illustration, just select Illustrate. The illustration will be produced. Click on **View Illustration** to view and print. To generate a 2nd illustration for the same policy, click on **Change Current Illustration** and enter the assumptions.



Other available options include:

- Select **Dividend/Paid Up** to make changes to dividend scale assumptions, current dividend option, or go Reduced Paid Up. Complete pertinent fields; click on **Save and Return to Illustration Set Up** then follow the same steps to illustrate, view and print.
- Select **Cash Flow** to change premium options, include an Excess Premium Dump-In (in the current year) or assume a withdrawal or loan option. Specific income amounts can be entered (solve features are not currently available). Click on **Save & Return** then follow the same steps to illustrate, view and print.
- Select **Riders** to ‘drop’ any Term Rider that is attached to the policy in a specific year. Click on **Save & Return** then follow the same steps to illustrate, view and print.

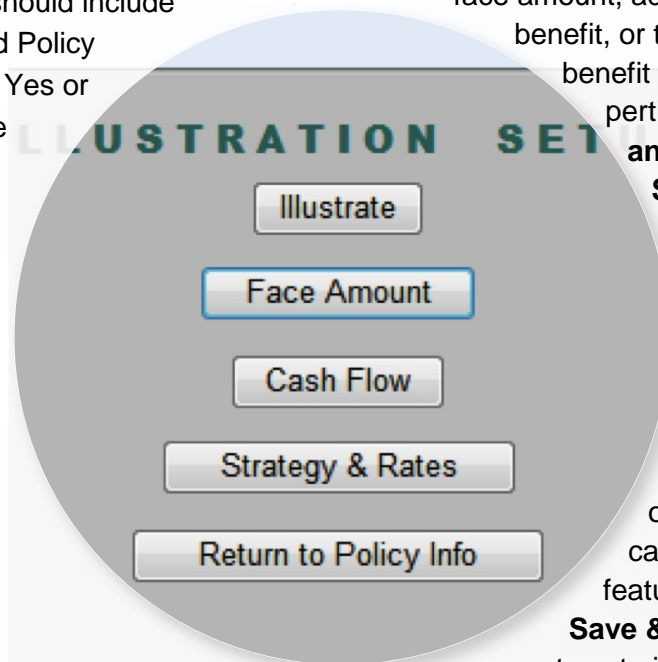
To submit a request for an illustration please forward your request to:
LifeCustomerService@NationalLife.com

Depending on the complexity of the request there will be a
24 – 72 hour turnaround time.

Note: Inforce illustrations do not check to see if assumed changes cause a MEC. If the policy is in the first seven (7) policy years or is within seven (7) years of a material change such as an increase in the Death Benefit you may want to contact the Home Office for assistance when decreasing the Face Amount or increasing the Planned Premium.

Inforce Web Illustrations (Universal Life)

To run an “As Is” illustration, just select Illustrate. For Universal Life policy, a pop-up will ask if the illustration should include the Cost of Insurance and Policy Expense Pages. Choose Yes or No. The illustration will be produced. Click on **View Illustration** to view and print. To generate a 2nd illustration for the same policy, click on **Change Current Illustration** and enter the assumptions.



Other available options include:

- Select **Face Amount** to make changes to the face amount, additional protection benefit, or to change the death benefit option. Complete pertinent fields; click on **Save and Return to Illustration Set Up** then follow the same steps to illustrate, view and print.
- Select **Cash Flow** to change premium options, assume a withdrawal or loan, or assume income options. Specific amounts can be entered or solve features are available. Click on **Save & Return** then follow the same steps to illustrate, view and print.
- Select **Strategy & Rates** to make changes to the strategy allocations or to decrease the crediting rate if a lower rate illustration is needed. Click on **Save & Return** then follow the same steps to illustrate, view and print.

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