

SIMPLIFY POLICY MANAGEMENT

Get a new perspective on life



Use LifeInsight to make life easier

LifeInsight is our patented, interactive policy management tool that simplifies monitoring policy goals, assumptions, and performance. Use it to help you gain insights and simplify managing policies.

Here are just some of the ways you can use LifeInsight:



Simplify policy assessments

- **Visually compare performance** to policy assumptions to help clients stay on track.
- **Access detailed insights** on subaccount and index performance.
- **Generate comprehensive client reports** instantly with just one click.



Actively manage your business

- **Stay ahead of upcoming client needs** with timely user alerts and notifications based on their plan.
- **Make online policy changes** such as reallocations for variable policies with Self Service Transactions.
- **Develop a long-term plan** by running term conversion illustrations and seeing clients' longevity scores and potential LTC needs.



Access real-time policy details

- **Access sales and in-force illustrations** quickly and easily.
- **Stay up-to-date with the latest policy information**, including values, rates of return, and transaction history, all at your fingertips.
- **Retrieve client statements**, communications, and other important documents.

 **Contact your local wholesaler for more information.**

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