



# Proformex Best Practices

TOPIC: **INFORCE INTELLIGENCE**

SUGGESTED CADENCE: **THE BEST PROFORMEX USERS DO THIS WEEKLY**

**Business Overview**

Product Breakdown

Carrier Breakdown

Carrier	Policies	Premium	Death Benefit
Prudential	205	\$4,051,942.00	\$1,275,154,917.00
Lincoln Benefit	104	\$1,767,187.87	\$296,250,000.00
Great West	26	\$512,668.00	\$260,000,000.00
John Hancock	112	\$830,749.45	\$190,722,405.55
Lincoln National	33	\$1,521,556.38	\$140,761,419.00
<b>Grand Totals</b>	<b>1164</b>	<b>\$15,272,048.13</b>	<b>\$3,179,610,977.99</b>

## Business Overview

- Chart and table display your book of business overview
- Toggle on top left will display your entire book of business as well as limit the view to only policies that have feeds enabled
- Proformex Best Practice is to limit view to feed-enabled policies only

**Intelligent Analysis**

Policies Lapse Pending

Policy Status	Primary Agent	Policy Number	Issue Date	Carrier	Policy Type	Product Name	Death Benefit	Annual Premium	Cash Value	Review Date	Review Status
Lapse Pending	Rubin Sullivan	PN7272001	08/21/2010	Zurich	Universal Life with Secondary Guarantees	Legacy Advantage SUI	\$4,000,000.00	\$0.00	\$25,654.52	02/18/2021	Ready for Review

## Lapse Pending

- Table displays all policies that are in Lapse Pending status
- Proformex Best Practice table configuration is displayed

**Intelligent Analysis**

Policies At Risk

Risk Class	Policy Status	Primary Agent	Policy Number	Issue Date	Carrier	Policy Type	Death Benefit	Annual Premium	Cash Value	Review Date	Review Status
Review Immediately	In Force	Rubin Sullivan	PN7593001	09/28/1991	Travelers	Universal Life	\$3,038,205.47	\$0.00	\$38,205.47	03/03/2021	Ready for Review
Review Immediately	In Force	Rubin Sullivan	PN7272001	02/21/2011	Lincoln Benefit	Universal Life	\$1,000,000.00	\$10,000.00	\$30,601.36	02/17/2021	Abandoned
Review Immediately	In Force	Rubin Sullivan	PN7278001	12/02/1987	AXA	Variable Universal Life	\$482,829.22	\$5,800.00	\$6,976.58	02/17/2021	Abandoned
Review Immediately	In Force	London Gallagher	PN7287002	12/23/2001	John Hancock	Universal Life	\$700,000.00	\$11,700.00	\$43,383.80	02/17/2021	Abandoned
Review Immediately	In Force	Michael Tate	PN7318003	09/22/2007	Prudential	Variable Universal Life	\$11,500,000.00	\$0.00	\$374,038.22	-	Not Started

## Policies At Risk

- Table displays all policies that could be at risk of lapsing
- Proformex Best Practice table configuration is displayed
- View 'Risk Class' column to see how Proformex has prioritized the suggested review timing

**Intelligent Analysis**

Replacement Opportunities Policy Breakdown

Level	Policy Status	Primary Agent	Policy Number	Issue Date	Carrier	Policy Type	Death Benefit	Annual Premium	Cash Value	Review Date	Review Status
Good	In Force	Rubin Sullivan	PN7263002	09/28/1991	Travelers	Universal Life	\$3,038,205.47	\$0.00	\$38,205.47	03/03/2021	Ready for Review
Good	In Force	Chad Cleveland	PN7292000	03/13/1995	Hartford	Universal Life	\$2,000,000.00	\$9,025.85	\$236,131.15	01/12/2021	Ready for Review
Good	In Force	Michael Tate	PN7219005	08/17/1999	Great West	Term	\$10,000,000.00	\$19,718.00	\$0.00	03/15/2021	Ready for Review
Good	In Force	Rebecca Beck	PN7334002	08/12/1998	Sun Life	Universal Life	\$2,000,000.00	\$0.00	\$460,030.01	03/15/2021	Ready for Review
Good	In Force	-	11 RegimeXX Best	11/11/2006	AAA	Indexed Life	\$999,000.00	\$888.00	\$7,895.00	02/24/2021	Ready for Review

## Replacement Opportunities

- Table displays all policies that could potentially be replaced
- Proformex Best Practice table configuration is displayed
- View 'Level' column to see how Proformex prioritized the lead

To learn more about how to best utilize Proformex, visit [www.proformex.com/resources](http://www.proformex.com/resources)