# **Proformex Best Practices**

**Q** TOPIC: SETTING REVIEW PARAMETERS

SUGGESTED CADENCE: THE BEST PROFORMEX USERS DO THIS DAILY

PROFORMEX				i 🖉 🐵 😡
Grant Home      B Trusts      Policies      Alerts      Analytics      C	🗆 Portfolios 🥥 Tasks 😵 Support			
4 Back to Pailcy Reviews Modify Review Select a Template				Enable Report
Policy Details				La Preview
Policy Status	In Force	Premiums Paid Since Inception		C Edit Guidelines
System Status	Active	Cost Basis	\$140,509.38	
Report Type	Policy Review	Lapse Age	100	
Policy Number	PN7303003	Death Benefit	\$1,150,000.00	
Policy Type	Universal Life with Secondary Guarantees	Crediting Rate	4%	
Product Name	SUL III Life Protection	Cash Value	\$98,273.39	
Anniversary Date	12/17	Surrender Value	\$82,660.89	
Issue Date	12/17/2001	Policy Loan Amount		
Carrier	Uncoln National	Policy Loan Rate		
Carrier Comdex	90	Maturity Date	-	
Annualized Premium	\$20,334.38	Grace Period	61 Days	
Number of Annualized Premiums Remaining		Guaranteed Crediting Rate	4%	
Premium Mode	Annual	Guaranteed Lapse Age		
Modal Premium	\$20,034.38	Life Expectancy	13.17	
Premium Date	12/17/2018	1035 Exchange Amount	-	

🕂 Policies 🗋 Alerts 🔝 Analytics 🗀 Portfolios 🤗 Tasks 😵 Support

Policy # PN7303003

Icme Food and Beverage	PN7303003	Nathon Salt, Mary Salt	100	\$1,150,000.00	\$20,334.38	48	80	\$98,273.39	\$82,660.89	12/1	7/2018
olicy Guidelines						Se	t Current Values	as Desired	Set Current Values	as Acceptable	Edit Guidelines
				Current		Desired		Acceptable	Range	Unac	ceptable
apse Age Ige at which life insurance polic	y will no longer be in force				•••				в		
Death Benefit Amount Above or Below Initial	Onboarded Policy Death Bene	ńt		\$1,150,0					×		
Premium The annual amount of policy fur	ding			\$20,3	<mark>1438</mark>				20,334.38		
Policy Performance The internal return of the policy											
arrier Performance	g of the insurance company				0				0		

Document	Requests	

Document Request Schedule		
Next Request Date	02/22/2021	
	Inforce Illustration	
Crediting Rate	Current	
Premium	Current	
# of Annualized Premiums	All Years	



#### To learn more about how to best utilize Proformex, visit www.proformex.com/resources

### **Setting Review Parameters**

- O Navigating to Setting Review the 'Modify Review' page
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- $\bigcirc$

## Set/Adjust Policy Guidelines

- O Proformex Best Practice's
- ٢ Desired' will change all lights to
- O Clicking 'Set Current Values as Acceptable' will change all lights to yellow
- O Clicking 'Edit Guidelines' will

#### **Set/Adjust Carrier** Requests

- O Document Request can be turned off by toggling the slider to the 'off'
- Selecting 'Edit' will let you change
- Selecting 'Design' will let you