



## Enhance & Simplify Your Policy Reviews

A simple, consolidated policy summary you can share directly with your clients.



### VISUALIZE

policy performance compared to policy goals

### REVIEW

consolidated policy information

### SUMMARIZE

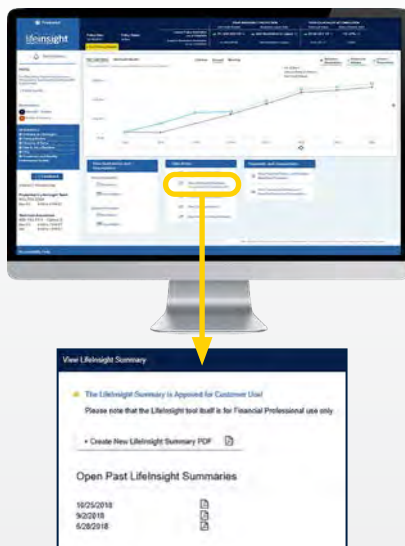
current performance to determine if changes are needed

### PLAN

for upcoming policy actions and changes with proactive notifications

## Accessing and using the LifeInsight Summary feature is simple

### ACCESS



Find the LifeInsight Summary directly beneath the graph in the "Take Action" Section

### LIFEINSIGHT SUMMARY



### REMEMBER, THE SUMMARY REPORT INCLUDES A CURRENT INFORCE ILLUSTRATION!

- 1 Visualize policy performance and show current values to *easily understand actual performance compared to goals.*
- 2 Share important policy details to *get a holistic view of the policy.*
- 3 Revisit the policy's baseline to *understand your client's original assumptions and determine next steps.*
- 4 Review upcoming policy actions to *prepare your clients for any necessary actions.*

\*The LifeInsight Summary is meant to be shared directly with clients, while the overall LifeInsight dashboard is meant for Financial Professional use only.

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