

lifeinsight[®]

YOUR NEW PERSPECTIVE ON LIFE.



A DIFFERENTIATED EXPERIENCE

LifeInsight is an interactive policy management tool that simplifies monitoring policy goals, assumptions, and performance.

USE LIFEINSIGHT TO...



Simplify the policy review process so you can **cut down on administrative time**



Focus on your clients' goals and easily identify changes in performance



Provide your clients with industry-leading reporting so they can make informed decisions



Build confidence with your customers by proactively staying aware of actionable items



Contact your local Sales Representative for more information!

1 View up-to-date policy information all in one spot

- Click on full policy details
- Browse values, guarantees and other key policy info

2 Review valuable notifications

Notifications generated to help you stay on top of upcoming **assumed actions**

3 Easy access to illustrations and assumptions

- Inforce and Baseline Illustrations are just a click away
- See snapshot of illustrated assumptions

4 Set or update a Baseline Illustration

1. Run an illustration that represents the customer's goals
2. On Case History, click 'Action' and 'Set as Baseline'


5 Model various 'what if' changes to the policy with Scenario Builder


Run different scenarios that can easily be compared to the Baseline and current inforce illustration


6 LifeInsight Summary is a customer-approved document

Make policy review meetings easier by printing a summary of the information you see in LifeInsight, including an inforce illustration!

8 Visually compare performance to policy assumptions

 **Baseline Illustration:**
Represents the customer's goals

 **Historical cash and death benefit values**

 **Inforce Illustration:**
Represents how the policy may perform in the future

7 Diagnose the policy

- View the Action Line to see how actions have impacted performance
- Go to the Transactions and Payments sections to see historical and planned activity



Access LifeInsight by searching for a policy in PruXpress or your Prudential Portal and click on the LifeInsight button

