

Enhance & Simplify Your Policy Reviews

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

The summary includes everything you need, including a current inforce illustration!

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!

- Visualize policy performance and show current values to *easily understand* actual performance compared to goals.
- Share important policy details to **get** a holistic view of the policy.
- Revisit the policy's baseline to understand your client's original assumptions and determine next steps.
- 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.



