What to Do Once You Receive a Statement or Illustration

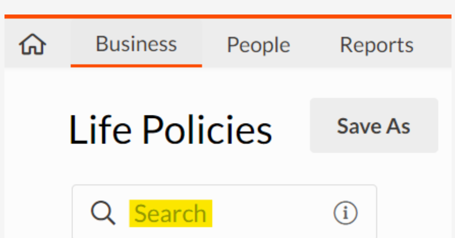
Proformex streamlines the process of obtaining statements and illustrations from carriers annually. The request instructs the carrier to return the documents to your designated inbox. Read below on what to do next once you receive a document in your return email.

Please note, carriers may initially respond to a request with an acknowledgement email prior to fulfilling the request.

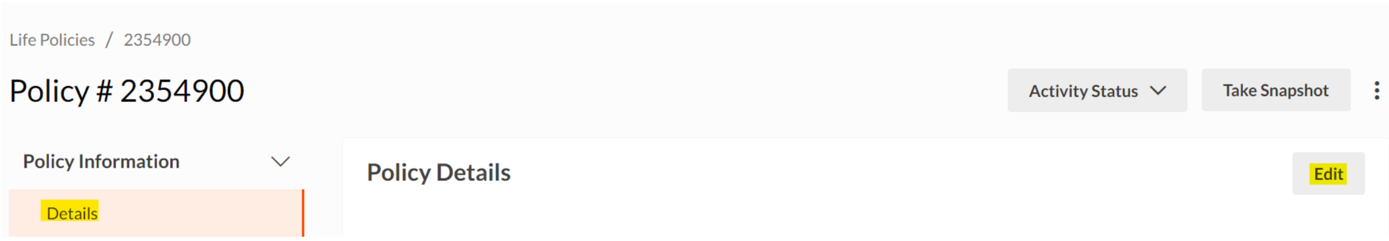
1. Navigate to that policy's Policy Details page

Find a policy via **Quick Search** in the top right corner

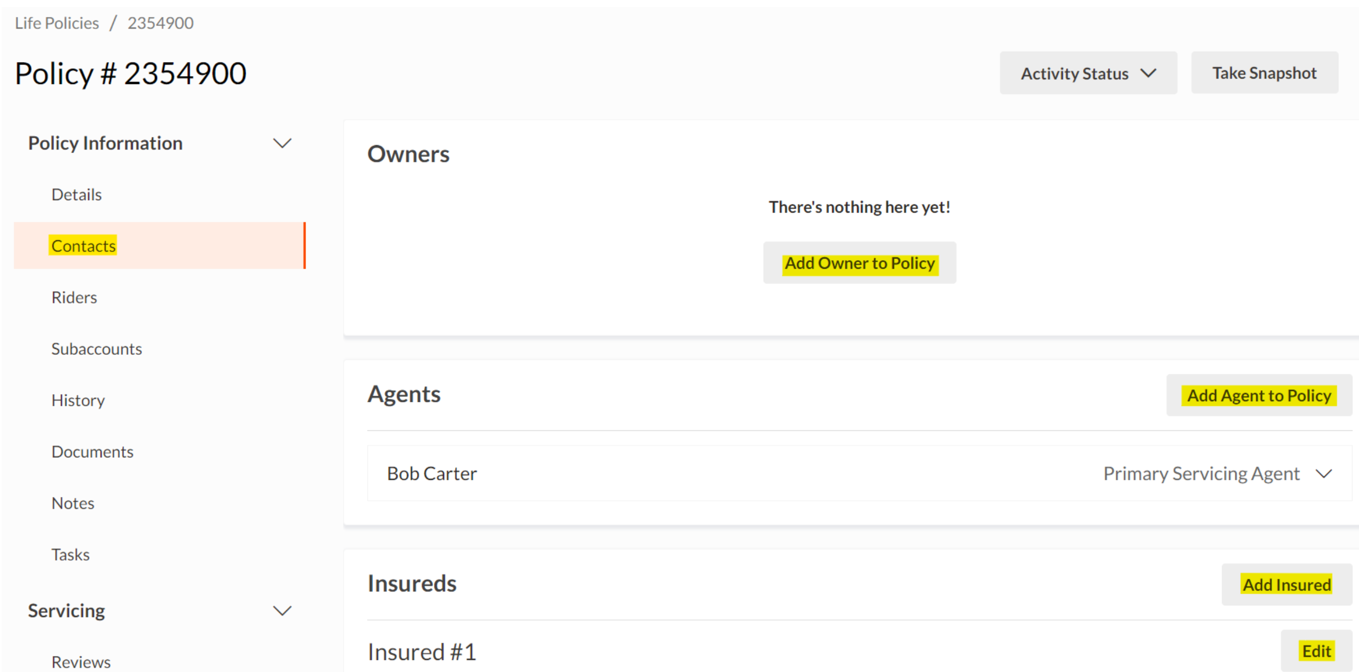
Or search within the **Business > Life Policies** page



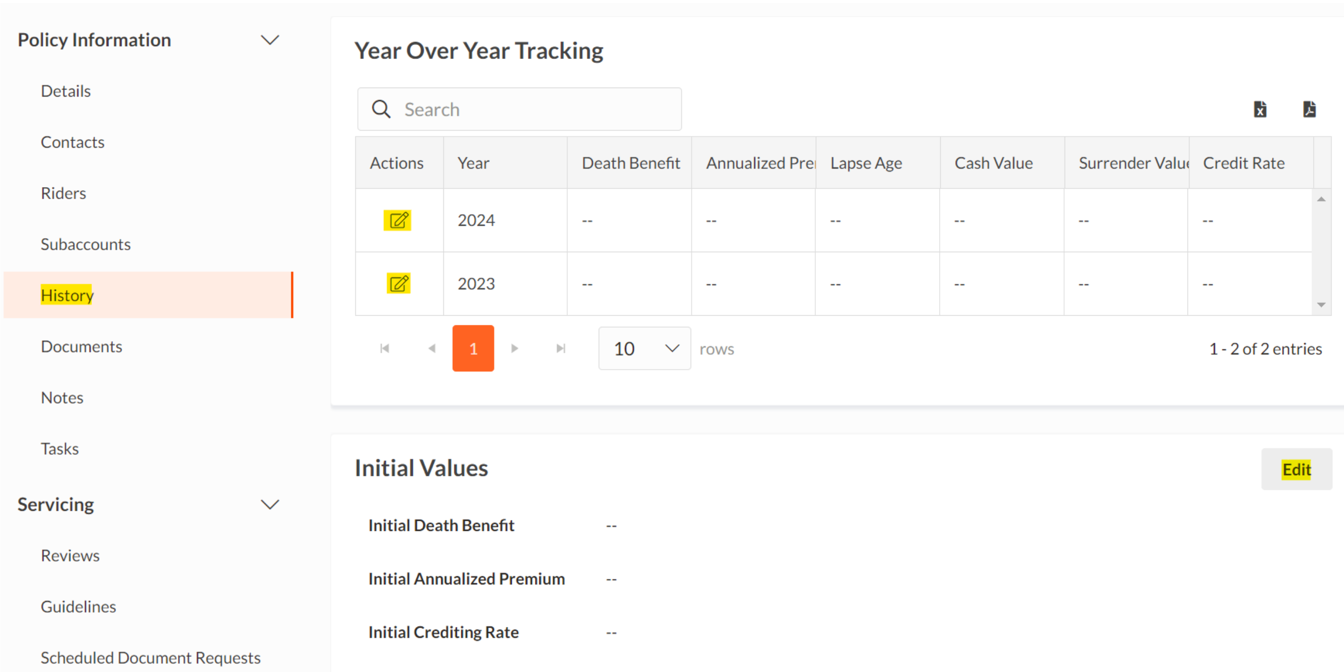
2. Click **Edit** to update policy values. Remember to **Save** your changes.



3. Navigate to the **Contacts** tab to **Add/Edit Owners**, **Agents**, **Insureds**, **Beneficiaries**, **Other Advisors**

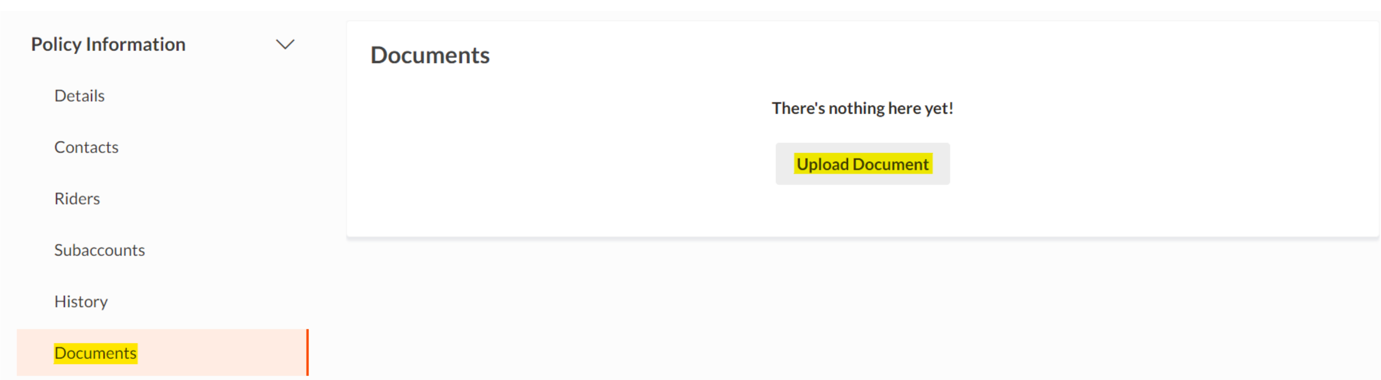


4. If desired, navigate to the **History** tab to update **Year Over Year Tracking** and **Initial Values**. Remember to **Save** your changes.



Note: Year(s) will populate on the Year Over Year Tracking table based on the age / Issue Date of the policy.

5. Navigate to the **Documents** tab to **upload** the PDF



For additional questions, please refer to our [Help Center](#) or reach out to your Customer Success Manager