

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.

Life Policies / 2354900

Policy # 2354900 Activity Status ▾ Take Snapshot ⋮

Policy Information ▾

Details

Policy Details Edit

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

Life Policies / 2354900

Policy # 2354900 Activity Status ▾ Take Snapshot ⋮

Policy Information ▾

Details

Contacts

Riders

Subaccounts

History

Documents

Notes

Tasks

Servicing ▾

Reviews

Owners

There's nothing here yet!

Add Owner to Policy

Agents Add Agent to Policy

Bob Carter Primary Servicing Agent ▾

Insureds Add Insured

Insured #1 Edit

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

Policy Information

- Details
- Contacts
- Riders
- Subaccounts
- History**
- Documents
- Notes
- Tasks

Servicing

- Reviews
- Guidelines
- Scheduled Document Requests

Year Over Year Tracking

Search

Actions	Year	Death Benefit	Annualized Pre	Lapse Age	Cash Value	Surrender Value	Credit Rate
	2024	--	--	--	--	--	--
	2023	--	--	--	--	--	--

10 rows 1 - 2 of 2 entries

Initial Values

Edit

- Initial Death Benefit --
- Initial Annualized Premium --
- Initial Crediting Rate --

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

Policy Information

- Details
- Contacts
- Riders
- Subaccounts
- History
- Documents**

Documents

There's nothing here yet!

Upload Document

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