PR^OFORMEX

What to Do Once You Receive a Statement or Illustration

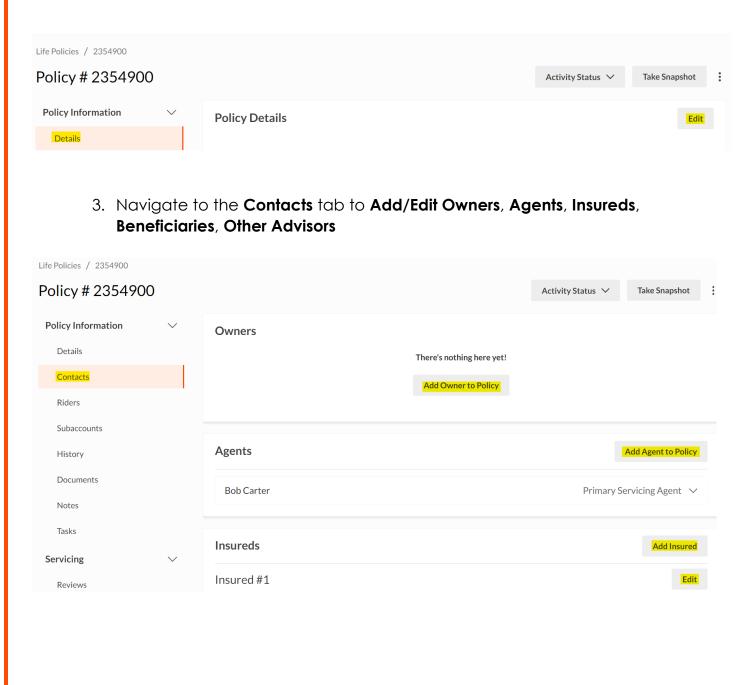
Proformex streamlines the process of obtaining statements and illustrations from carriers annually. The request instructs the carrier to return the documents to your designated inbox. Read below on what to do next once you receive a document in your return email.

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

Finc	l a policy via Qu				
Ρ	olicy Number 🗸 🗸	Search		?	
Or s	earch within the	Business > Li	fe Policies page		
			fe Policies page		
Or s ි	earch within the Business People	Business > Li	fe Policies page		
			fe Policies page		
	Business People	Reports	fe Policies page		

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



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

Policy Information \sim	Year Ove	er Year Tracl	king						
Details	Q Search						×	Å	
Contacts	Actions	Year	Death Benefit	Annualized Pre	Lapse Age	Cash Value	Surrender Value	Credit Rate	
Riders		2024							^
Subaccounts		2024							
History	ß	2023							-
Documents	M 4	1 > >	10 ~	rows				1 - 2 of 2 en	tries
Notes		_							
Tasks	Initial Va	alues						E	dit .
Servicing \checkmark	V Initial Death Benefit								
Reviews	Initial App	ualized Premium							
Guidelines		diting Rate							
Scheduled Document Requests									

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	\sim	Documents
Details		There's nothing here yet!
Contacts		Upload Document
Riders		
Subaccounts		
History		
Documents		

For additional questions, please refer to our <u>Help Center</u> or reach out to your Customer Success Manager