

# Guide to Client Deliverables

There are various types of deliverables that can be generated in Proformex and shared with your clients, learn more below

## Policy Snapshot

Snapshot of Policy 6778888

Policy Status: In Force Carrier: AXA Equitable

Overview	Death Benefit	Annualized Premium	Credit	Issue Age	Crediting Rate
	\$5,000,000.00	\$115,500.00	B2	91	2.50%

**Details**

Policy Type	Product Name	Anniversary Date	Issue Date	Cash Value
Universal Life	Affera UL	01/02	1/2/2012	\$249,850.82

**Death Benefit**

Death Benefit: \$5,000,000.00

**Premiums**

Annualized Premium	Premium Mode	Modal Premium	Premium Date
\$115,500.00	Annual	\$115,500.00	1/2/2022

**Initial Values**

Initial Death Benefit	Initial Premium	Initial Crediting Rate
\$5,000,000.00	\$115,500.00	2.50%

**Owners**

Name	Type
Heidi Children Trust	Trust

**Agents**

Name	Type
Carren Phillips	Primary Servicing Agent

Powered by Proformex

Quick synopsis of policy information on hand

Policy Details > Take Snapshot

[What is the Policy Snapshot?](#)

## Policy Review

AXA Equitable

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Policy Owner: Heidi Children Trust  
 Policy Number: 6778888  
 Carrier: AXA Equitable  
 Policy Type: Universal Life  
 Product Name: Affera UL

We believe the sources to be reliable, however, the accuracy and completeness of the information is not guaranteed. In the event of any discrepancy, the agent's information shall prevail. Performance data represents past performance and does not guarantee future results. The information presented in this report is not intended to be used as a basis for investment decisions and should not be relied upon for the purpose of legal, tax, or other professional advice. The information contained in these reports is collected from sources believed to be reliable, however, the accuracy and completeness of the information is not guaranteed. Always rely on statements and recommendations from your advisor, whose qualifications should be determined by you. If you have any questions regarding your report, please call your representative.

Formal review of policy information and performance

Policy Details > Servicing > Reviews > Open OR  
 Servicing > Policy Reviews > View Open and Finalized Reviews

[How Do I Create a Policy Review?](#)

## Owner Coverage Report

Coverage Report

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Owner Coverage Report  
 Karina R Miller

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Consolidate multiple policies for a particular owner

People > Owners > Owner Name > Coverage Report > Add Coverage Report

[How Do I Use the Owner Coverage Report?](#)

For additional questions, please reach out to your Customer Success Manager