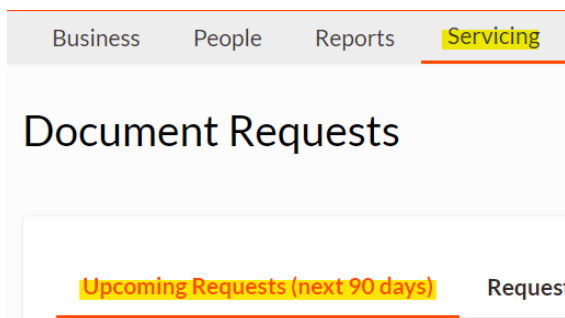


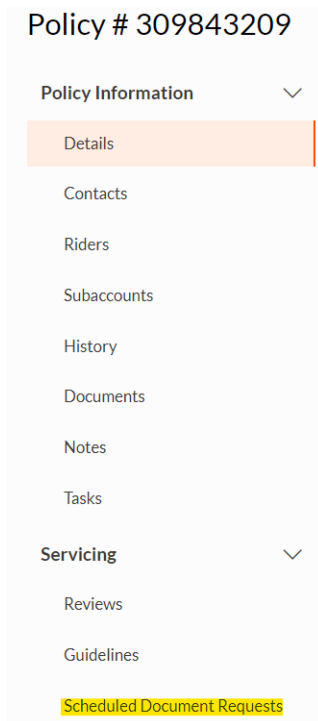
Guide to Designing a Document Request

1. Navigate to a policy's Policy Details page

You can also navigate to Servicing > [Document Requests](#) to modify requests based on the upcoming schedule



2. Click the **Scheduled Document Requests** tab on the left-hand side of the policy's Policy Details page



3. Click **Design** (Document Requests must first be enabled for the policy)

Document Request Schedule

Next Request Date 07/17/2025

Inforce Illustration

Crediting Rate Current

Premium Current

of Annualized Premiums All Years

Design Edit

4. **Enter your changes** into the body of the message

Select font family Select font size **B** *I* U **A**

An As-Is Inforce Illustration at current % crediting rate paying scheduled premium annually, for all remaining years.

Most Recent Annual Statement

Tip: Use 'Shift+Enter' to add spacing between lines

5. Click **Save** at the bottom right of the dialog box

Cancel

Save

The request will then indicate it's been 'Designed' and will be used for all future requests

Document Request Schedule Edit


Next Request Date 07/17/2025

Designed Illustration Remove View

This policy is using a 'Designed' Illustration Request. Click 'View' to see or edit the policy's current request letter.

Please note, if a request is in-process you will not be able to Design the request

Document Request Schedule

 A Document Request for this policy is currently in-process, so request information cannot be modified at this time.

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