



Partners Website Guide

A USER GUIDE TO COLUMBIAN'S AGENT WEBSITE

Columbian Mutual Life Insurance Company Home Office: Binghamton, NY
Columbian Life Insurance Company Home Office: Chicago, IL • Administrative Service Office: Binghamton, NY
Columbian Life Insurance Company is not licensed in every state.

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Introduction

Partners is Columbian's secure website for agents to contact us, view and/or download business information, bulletins, announcements, and forms. The Partners Website provides 24/7 access to the current status of applications, policies, and commissions for your business.

Getting Started

To enroll in the Partners Website, go to cfglife.com/producer-login and click the Log in to Partners link. Tap or click the "Not registered? Enroll here!" link.

The screenshot shows the 'Please Log In' section of the website. It includes input fields for 'User ID' and 'Password', a 'Log In' button, and a link to 'Show Agreement'. Below the login fields are two links: 'Not registered? Enroll here!' and 'Forget your password? Reset here!'. A blue callout bubble points to the 'Enroll here!' link with the text 'Click here to register.'

Enter the first six digits of your Columbian Agent Number, the last four digits of your tax ID, and one of the following: date of birth, zip code, telephone number or email address.

The screenshot shows the 'User Enrollment' page. It has a title 'Please help us to identify you' and three input fields: 'First SIX digits of CFG Agent Number: *', 'Last four digits of tax ID: *', and 'Date of birth (mm/dd/yyyy): *'. A 'Continue' button is at the bottom left. A blue callout bubble points to the 'Continue' button with the text 'Continue to set up your login information.' Another blue callout bubble points to the 'Date of birth' field with the text 'Date of birth, zip code, phone number or email address'. A third blue callout bubble points to the 'First SIX digits of CFG Agent Number' field with the text 'Enter only the first six digits of your agent number.' A yellow background is visible on the input fields.

If you have registered but forgotten your password, click the reset link. You will be able to reset your password after providing the identifying information above.

This screenshot is identical to the one above, showing the 'Please Log In' section. A blue callout bubble points to the 'Forget your password? Reset here!' link with the text 'Click here if you forget your password.'

Need Help?

For help with getting registered or navigating the Partners website, contact Sales Support at 800-423-9765, extension 7582.

Agent Home Page

Your Home page will display after you log in to Partners. This page provides an overview of your application history and any pending applications, including information regarding any action needed before a policy can be issued.

The screenshot shows the Partners Website Agent Home page. At the top, there is a navigation bar with links for SITE MAP, HELP, PROFILE, CONTACT US, and LOGOUT. Below this is a search bar for finding agents. The main content area includes a 'My Menu' section with links for Home, Commissions, Resources, Production, Policy Management, and Policy Search. A user profile section displays the name Peter Producer, email PProducer@speed.net, and CFG Agent ID 123456, with a 'Change it!' link for the address. A row of buttons provides access to Claim Notification, Customer Service, New Business and Underwriting, Premium and Billing, Request for Customer Service Forms, Sales and Marketing, and Other. A dropdown menu shows 'Currently Viewing Business for: Final Expense' with a 'Change' button and a 'Set Default Business View' link. The 'Agent Home' section contains links to download the Final Expense Risk Qualifier and Premium Calculator, and the Final Expense Quote Software. Below this are sections for 'View Payment by Check' and 'View Deposit', each with a date selector and 'Get Detail' button. The 'Application History' section features a table with columns for Week, Last 30 Days, Year to Date, and Since Inception, each with sub-columns for Count, Premium, and Face Amt. The table is divided into 'Submitted' and 'Issued & Paid' sections. The 'Submitted' section includes rows for Accepted, Declined, and Graded applications. The 'Issued & Paid' section includes rows for Issued & Paid, Not Taken, Net Issued & Paid, and Graded applications. The 'Applications Pending' section shows a table with rows for Proceeding and Action Needed. Callouts provide instructions: 'Update your email address here' points to the 'Change it!' link; 'Update your profile here' points to the PROFILE link; 'Use buttons to send questions or messages' points to the 'Other' button; 'If you are appointed in more than one market class, select the market class you wish to view and click the Change button' points to the 'Change' button; 'Your application history for the past week, 30 days, year to date and since inception' points to the table; 'Submitted applications' points to the 'Submitted' section; 'Issued & Paid applications' points to the 'Issued & Paid' section; 'Any action needed on a pending application will be shown here' points to the 'Action Needed' row; 'Click on any green underlined link for details' points to the underlined '33' in the 'Count' column; 'News & Alerts show here' points to the 'Agent Home' section; 'View commission deposit details' points to the 'View Deposit' section; and 'Your pending applications' points to the 'Applications Pending' section.

Contact Us

The fastest and easiest way to contact us is by sending a message through the Partners Website. Click the appropriate contact button or the Contact Us link at the top of the page and complete the online form.

News & Alerts

Any alerts from the Company will also be shown on your Home page when applicable. Examples of alerts include:

- A policy is in danger of lapsing
- An account has a balance due
- A new bulletin or form has been posted since the last time you logged in
- General announcements from the Company

View Payment by Check / View Deposit

The View Payment by Check and View Deposit tools allow you to view details for commission payments made by check or by deposit. Select a check or deposit from the drop-down menu and click the Get Detail button.

View Payment by Check

Jul 01, 2021 317189-001 \$40.85 Get Detail

View Deposit

2021-07-01 Get Detail

Use drop down to select a date

Application History

The application history shows an overview of your business in the past week, last 30 days, year to date and since you were contracted with Columbian.

Application History											
	Week 08/27/2020 - 08/31/2020			Last 30 Days 08/02/2020 - 08/31/2020			Year to Date 01/01/2020 - 08/31/2020			Since Inception 01/01/1900 - 08/31/2020	
	Count	Premium	Face Amt	Count	Premium	Face Amt	Count	Premium	Face Amt	Premium	Face Amt
Submitted (Based on submission date.)											
Accepted	<u>1</u>	2,655.47	2,674.19	<u>7</u>	9,653.13	9,722.15	<u>21</u>	66,359.77	67,203.31	<u>191</u>	906,019.45
Unissued	0	0.00	0.00	0	0.00	0.00	<u>1</u>	2,443.00	2,505.64	<u>1</u>	2,443.00
Issued & Paid (Based on production date.)											
Issued & Paid	<u>1</u>	2,655.47	2,674.19	<u>7</u>	9,653.13	9,722.15	<u>22</u>	68,802.77	69,708.95	<u>192</u>	908,462.45
Not Taken	0	0.00	0.00	0	0.00	0.00	<u>1</u>	2,443.00	2,505.64	<u>1</u>	2,443.00
Net Issued & Paid	<u>1</u>	2,655.47	2,674.19	<u>7</u>	9,653.13	9,722.15	<u>21</u>	66,359.77	67,203.31	<u>191</u>	906,019.45

Application Details

Application History (Submitted) - Accepted, Last 30 Days (08/02/2020 - 08/31/2020)												
	Policy	Insured	Annualized Premium	Face Amount	Policy Share	Submitted	Issued	Effective	Paid To	Status	Plan Name	Benefit
	123456789	Walter White	2,281.00	2,283.28	1.0	08/06/2020	08/06/2020	08/05/2020	08/05/2038	Inforce	Elite	Full
	234567890	Earl Grey	614.22	618.55	1.0	08/18/2020	08/18/2020	08/05/2020	08/05/2043	Inforce	Elite	Full
	345678901	Sam Green	593.00	608.21	1.0	08/18/2020	08/18/2020	08/18/2020	08/18/2052	Inforce	Elite	Full
	456789012	Violet Hue	614.22	618.55	1.0	08/18/2020	08/18/2020	08/18/2020	08/18/2045	Inforce	Select	Full
	567890123	Lewis Black	614.22	620.42	1.0	08/18/2020	08/18/2020	08/18/2020	08/18/2046	Inforce	Elite	Full
	678901234	Red Buttons	614.22	620.42	1.0	08/18/2020	08/18/2020	08/18/2020	08/18/2047	Inforce	Elite	Full
	78901234	Bert Brown	2,655.47	2,674.19	1.0	08/28/2020	08/28/2020	08/27/2020	08/27/2043	Inforce	Elite	Full

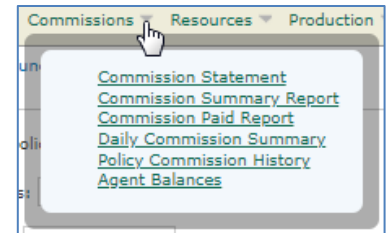
Applications Pending

When an application is being processed, it will be shown as 'Proceeding.' If any action is needed before the policy can be issued, it will be listed as 'Action Needed' and any requirements will be shown.

Applications Pending		
Proceeding	0	-
Action Needed	-	-

Commissions Tab

The Commissions tab allows you to access your Commission Statement, Daily Commission Summary and Policy Commission History, and Agent Balances, if applicable.



Commission Statement

You can view a summary of current activity, view previous statements, or search by a date range.

Commission Statement

Agent:

Account:

Report Dates:

- 08/31/2020
- 07/31/2020
- 06/30/2020

*You can request a statement spanning multiple dates by holding the **Shift** key and mouse-clicking on the beginning and end dates you choose.*

To search for a more specific range of report dates:
 Start Date: (MM/DD/YYYY)
 End Date: (MM/DD/YYYY)

Request Report

Commission Summary Report

Click for: [Print version / PDF](#) [XML](#)

Commission Summary

AMOUNT PAYABLE* : \$568.70

Description		04/01/2021 - 05/13/2021	Month To Date	Year To Date
Beginning Balance		17.08	0.00	0.00
Less Advance Chargebacks	-	-11.58	-11.58	-11.58
Plus First Year Commissions	+	29.05	3.13	149.45
Less Advances Repaid	-	-6.02	0.00	-18.30
Plus Renewal Commissions	+	21.37	10.28	21.37
Plus Transfers	+	278.80	-121.83	1,460.61
Plus Bonus	+	240.00	120.00	240.00
Less Amount Paid	-	-568.70	0.00	-1,841.55
Equals Balance Due CFG	=	-0.00	0.00	-0.00

Commission Paid Report

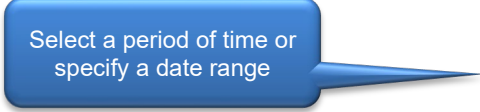
To view the Commissions Paid Report, select a date range type.


Commission Paid Report

Display Commissions at this Amount or Higher:

Select Date Range Type:

Last 7 Days
 Last 30 Days
 Last 365 Days
 Date Range





Commission Paid Report from 07/02/2020 through 07/01/2021

(For paid amount \$0.00 or higher)

Agent Number	Agent Name	Manager Number	Manager Name	Last Commission Paid	Payment Frequency	Amount Paid
123456	Andy Agent	987654	Martin Manager	5/28/2021	Daily	\$34,219.74
123456	Andy Agent	987654	Martin Manager	5/26/2021	Weekly	\$12,567.80
123456	Andy Agent	987654	Martin Manager	5/26/2021	Weekly	\$10,519.15
456789	Ursula Upline		Ursula Upline	5/26/2021	Weekly	\$7,757.16
456789	Ursula Upline		Ursula Upline	5/26/2021	Weekly	\$7,186.58
123456	Martin Manager		Martin Manager	5/26/2021	Weekly	\$7,032.10
789012	Ronald Representative	321987	George General	5/26/2021	Weekly	\$6,110.98
789012	Ronald Representative	321987	George General	5/26/2021	Weekly	\$6,057.83
789012	Ronald Representative	321987	George General	5/26/2021	Weekly	\$6,037.04



Daily Commission Summary

The Daily Commission Summary shows itemized commissions for a specific date.

Daily Commission Summary for Diversified Health Marketers Inc

Date: 07/02/2021

Agent #	Account	Hold Reason	Agent Name	Balance	Unearned Advance Balance	Agent Account Status
123456	001		Andy Agent	25.32		Active
123456	001		Andy Agent	22.82	-2,754.40	Active
123456	003		Andy Agent	29.47	-626.83	Active
123456	011		Andy Agent	0.00	-142.75	Active
123456	014		Andy Agent	22.95	0.00	Active
123456	015		Andy Agent	33.80	-1,409.57	Active
123456	016		Andy Agent	55.52	0.00	Active
123456	017		Andy Agent	9.81	0.00	Active
123456	020		Andy Agent	34.86	0.00	Active
123456	023		Andy Agent	57.22	0.00	Active
123456	024		Andy Agent	112.67	-1,647.88	Active
123456	026		Andy Agent	20.55	0.00	Active
123456	027		Andy Agent	12.68	0.00	Active
123456	030		Andy Agent	20.00	0.00	Active
123456	031		Andy Agent	10.82	0.00	Active
NET Commission:				468.49		

Policy Commission History

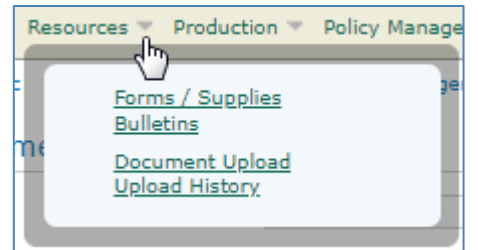
The Policy Commission History allows you to look up the history for a specific policy.

Policy Commission History

Policy

Resources Tab

The Resources tab allows you to print or download forms, read bulletins, securely upload documents to the Company and see your upload history.



Downloading Forms

To access forms, click on the Forms / Supplies link and choose your state from the drop down list, then click the Next button.

Final Expense Forms for AZ
Instructions: You can filter the list of forms by typing criteria into one or more of the fields:

Form Number Title Category

Search for a form number, name or category by entering a search term

Form Number	Title	Date	Category	Size
5380CFG (rev. 02/2021)	CFG Website Flyer	04/23/2021	Reference	8.5 x 11 in.
5374CFG (rev. 02/2021)	Monthly EFT Face Amount Tables (FE 2020)		Rate Sheets	8.5 x 11 in.
Public Communications / About Columbian Brochure			Reference	8.5 x 11 in.
Public Communications / About Columbian - Spanish		03/04/2021	Reference	8.5 x 11 in.
5309CFG (rev. 01/2021)	Application Tips (FE 2020)	02/05/2021	Reference	8.5 x 11 in.
4355CFG (rev. 12/2020)	Needs Analysis Form	01/21/2021	Forms	8.5 x 11 in.
4355CFG-S (rev. 12/2020)	Needs Analysis Form - Spanish	01/21/2021	Forms	8.5 x 11 in.
5378CFG (rev. 01/2021)	Final Expense Agent Reference Guide (FE 2020)	01/11/2021	Reference	8.5 x 11 in.
5379CFG (rev. 01/2021)	Final Expense Underwriting Guidelines (FE 2020)	01/11/2021	Reference	8.5 x 11 in.
6085-CL (rev. 09/2020)	Telesale Procedure Guide	10/19/2020	Reference	8.5 x 11 in.
5045CFG-AZ (rev. 10/2020)	New Business Checklist (FE 2020)	10/15/2020	Reference	8.5 x 11 in.
5378CFG-S (rev. 07/2020)	Final Expense Agent Reference Guide - Spanish	09/22/2020	Reference	8.5 x 11 in.

Click the arrow at the top of a column to sort the list

Click a link to open or download a form

Bulletins

The Bulletins link allows you to access any previously posted bulletin.

Bulletins

Bulletin Number	Title	Date
CLIC-21-2675	Company Position on Policy Replacements	04/05/2021
CFG-21-2676	Advertising Practices	03/31/2021
CML-21-2674	Annual New York Reminders	03/25/2021
CFG-20-2666	COVID-19 Underwriting Guidelines	12/02/2020
CML-20-2665	NY Reg 500 Cybersecurity Training	11/19/2020
CFG-20-2664	Risk Assessments by Email	11/13/2020
CFG-20-2658	Final Expense Underwriting Improvements	07/24/2020

Click a link to open a bulletin

Document Upload

The Document Upload feature allows you to securely upload New Business applications, Customer Service forms, Commission Administration forms or Premium Administration forms.

Simply scan or photograph the documents and upload them electronically from your phone, tablet or computer. When sending photos of documents, make sure the information is legible and be sure to capture the form in its entirety, including the form number. You may attach up to ten files, but do not combine multiple insureds or policies in one transmission.

Document Upload

This form utilizes Internet encryption technology to ensure safe and secure transmission of your documents. Complete the form and click "Upload" button. The yellow highlighted items are required.

Sender Details

Sender: 501009 Columbian Representative

Sender Email:

Sender Phone:

Please enter information related to this transmission.

In accordance with my Columbian agent contract and applicable regulations, I understand that I am responsible to safeguard personal customer information stored on my computer or mobile devices. I agree to immediately remove all images containing nonpublic personal information from my mobile device after the upload to CFG is completed to avoid inadvertent disclosure of such information.

Send To:

Remarks:

Please select no more than 10 files related to this transmission. Maximum file size is 10 Mb and maximum total upload size is 30 Mb. Allowed formats are TIFF, PDF, JPG, PNG. Do not combine multiple insureds or policies in one transmission. An image of your uploaded files will be viewable for 14 days after the upload date. A summary of your upload will be available in your Upload History for 90 days.

Attach files to upload:

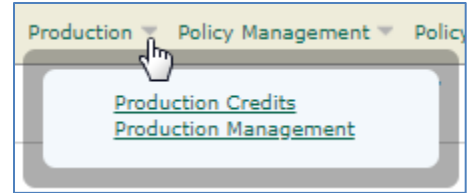
Annotations:

- Select from the drop down menu
 - Commission Administration
 - Customer Service
 - New Business
 - Premium Administration
- Attach up to ten PDF, JPG, PNG or TIFF forms
- When ready, click the Upload button

A summary of your upload will be available in your Upload History for 90 days. Images are available for 14 days after upload.

Production Tab

The Production tab allows you to view Agent Production Credits and Managed Production Credits for selected periods of time.



Agent Production Reports

The Agent Production Credits screen allows you to see production for the period of time you choose. You can also view production for multiple periods of time to compare production. For example, you could compare the previous month's production to the same month last year.

Use the drop down menus to select a time period

Click on any green link for details

Select multiple periods of time for production comparisons

Agent Production Credits							
Production Credits							
1 January 2020 to 30 September 2020 (274 days) Update >> Remove this block							
Personal Credits				Managed Credits			
Submitted	Count	Premium	Face Amt	Submitted	Count	Premium	Face Amt
Issued & Paid	23.0	71,963.72	72,901.83	Submitted	4.0	25,046.75	25,149.89
Not Taken	23.0	71,963.72	72,901.83	Issued & Paid	4.0	25,046.75	25,149.89
Net Issued & Paid	1.0	2,443.00	2,505.64	Not Taken	0.0	0.00	0.00
	22.0	69,520.72	70,396.19	Net Issued & Paid	4.0	25,046.75	25,149.89

1 September 2020 to 30 September 2020 (30 days) Update >> Remove this block							
Personal Credits				Managed Credits			
Submitted	Count	Premium	Face Amt	Submitted	Count	Premium	Face Amt
Issued & Paid	1.0	3,160.95	3,192.88	Submitted	0.0	0.00	0.00
Not Taken	1.0	3,160.95	3,192.88	Issued & Paid	0.0	0.00	0.00
Net Issued & Paid	0.0	0.00	0.00	Not Taken	0.0	0.00	0.00
	1.0	3,160.95	3,192.88	Net Issued & Paid	0.0	0.00	0.00

24 September 2020 to 30 September 2020 (7 days) Update >> Remove this block							
Personal Credits				Managed Credits			
Submitted	Count	Premium	Face Amt	Submitted	Count	Premium	Face Amt
Issued & Paid	0.0	0.00	0.00	Submitted	0.0	0.00	0.00
Not Taken	0.0	0.00	0.00	Issued & Paid	0.0	0.00	0.00
Net Issued & Paid	0.0	0.00	0.00	Not Taken	0.0	0.00	0.00
	0.0	0.00	0.00	Net Issued & Paid	0.0	0.00	0.00

Managed Agent Production Reports

The Managed Agent Production report is available to managers and shows production for all agents within the Agency.

Managed Agent Production

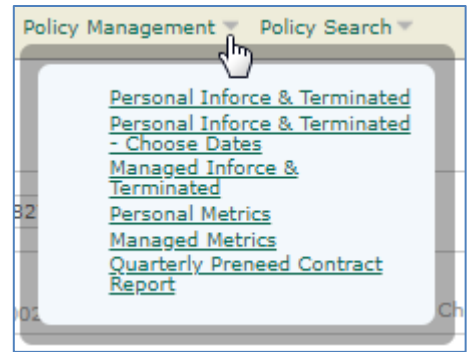
2 October 2019 to 30 September 2020 (365 days) Set dates >>

Agent		Submitted			Issued & Paid			NT/Issued			Not Taken			Net Issued		
Number	Name	Policies	Premium	Face Amt	Policies	Premium	Face Amt	Premium	Policies	Premium	Face Amt	Policies	Premium	Face Amt		
Total		32.0	122,171.65	123,374.75	32.0	122,171.65	123,374.75	0.0199965	1.0	2,443.00	2,505.64	31.0	119,728.65	120,869.11		
123456	Molly Marketer	28.0	97,124.90	98,224.86	28.0	97,124.90	98,224.86	0.0251532	1.0	2,443.00	2,505.64	27.0	94,681.90	95,719.22		
234567	Catherine Counselor	0.0	0.00	0.00	0.0	0.00	0.00	0.0	0.0	0.00	0.00	0.0	0.00	0.00		
345678	Sylvia Seller	0.0	0.00	0.00	0.0	0.00	0.00	0.0	0.0	0.00	0.00	0.0	0.00	0.00		
456789	Samuel Smith Jr	0.0	0.00	0.00	0.0	0.00	0.00	0.0	0.0	0.00	0.00	0.0	0.00	0.00		
567890	Andrew Advisor	0.0	0.00	0.00	0.0	0.00	0.00	0.0	0.0	0.00	0.00	0.0	0.00	0.00		
678901	Samuel Smith III	0.0	0.00	0.00	0.0	0.00	0.00	0.0	0.0	0.00	0.00	0.0	0.00	0.00		
789012	Peter Producer	4.0	25,046.75	25,149.89	4.0	25,046.75	25,149.89	0.0	0.0	0.00	0.00	4.0	25,046.75	25,149.89		

Managers can click the dashboard symbol next to any agent's name to view the agent's dashboard

Policy Management Tab

The Policy Management tab allows you to view Inforce & Terminated business, past due policies, and Agent Metrics. Managers can view reports for personal or managed business.



Inforce & Terminated Reports

The Inforce & Terminated report is available for personal production or managed production.

Click for: [Print version / PDF](#) [XML](#)

This report can be downloaded to a PDF file or to a spreadsheet

Inforce & Terminated (Personal) \$638,805

As Of Date: 10/21/2020 (mm/dd/yyyy)

Update

Policy Year	Submitted	Not Taken	Declined	Rescinded	Deaths	Lapsed	Incomplete	Matured	Inforce
Policy Counts									
1	27	1	3.7%	0	0.0%	0	0.0%	0	25
2	35	0	0.0%	0	0.0%	0	0.0%	0	27
3	19	0	0.0%	0	0.0%	0	0.0%	0	12
4	22	0	0.0%	0	0.0%	0	0.0%	0	19
5	23	0	0.0%	0	0.0%	0	0.0%	0	11
Total	126	1	0.8%	0	0.0%	0	0.0%	0	94
Annualized Premium									
1	107,444	2,443	2.3%	0	0.0%	0	0.0%	0	102,720
2	170,930	0	0.0%	0	0.0%	0	0.0%	0	133,949
3	92,096	0	0.0%	0	0.0%	0	0.0%	0	67,458
4	126,804	0	0.0%	0	0.0%	0	0.0%	0	114,569
5	141,530	0	0.0%	0	0.0%	0	0.0%	0	60,219
Total	638,805	2,443	0.4%	0	0.0%	0	0.0%	0	478,915

Agent Metrics

The Agent Metrics reports are designed to help producers and managers track persistency and placement ratio. Data is updated monthly.

Target Metrics show the baseline percentages which will result in an "A" or "B" score. Targets are measured against all agents' percentages and are not reflective of a product's persistency requirements.

Data as of 09/30/2020

Target Metrics

Target metrics are those that result in being in the top 40% of selling agents

	12 Month Premium Paying Persistency	24 Month Premium Paying Persistency	Placement Ratio	Rescission Ratio
FINAL EXPENSE FULL BENEFIT	77%	67%	82%	0%
FINAL EXPENSE GRADED BENEFIT	64%	50%	79%	0%

Click for: CSV

Click to download

Target Metrics are based on the top 40% of selling agents

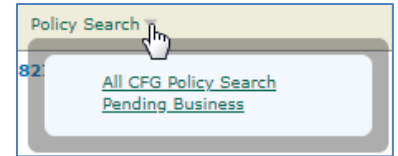
Hover over column headers for explanation of each category

Click the plus sign for details

Agent Id	Account Id	Product	Issue Year	12 Month Premium Paying Persistency Score	24 Month Premium Paying Persistency Score	Placement Ratio Score	Rescission Ratio Score	Applications Submitted	Not Taken	Other Applications Not Issued	Policies Issued	Premium Paying Policies Inforce	ETI & RPU Policies Inforce	Policies Issued at least 12 months prior	Premium Paying Policies after 12 months	Policies Issued at least 24 months prior	Premium Paying Policies after 24 months	Deaths during Contestable Period	Death Rescissions	Live Rescissions	
123456		PRENEED MULTIPLE	10/2019	A	100%	A	100%	A	0%	A	1	0	0	1	1	0	1	1	0	0	
123456		PRENEED MULTIPLE	10/2019	B	82%	B	99%	B	0%	A	172	1	0	171	121	148	130	115	94	29	0
123456		PRENEED MULTIPLE	10/2019	A	62%	A	100%	A	0%	A	21	0	0	21	8	0	18	16	16	10	0

Policy Search Tab

The Policy Search tab allows you to look up policy information for in force and terminated policies and for pending business.



All CFG Policy Search

You can search for all policies or filter your search by type or status.

Select policies by: **All** Search all policies or search by policy number, name, state or zip code

Statuses: **All** Include all statuses or filter by pending, in force or terminated status

Agents: **Me** Managers can select "Me" or "Me and Below" to include managed business

Display Results on Screen
 Download Results for Viewing
 Download Results for Import

Last Night (Fast) Up-To-Date (Slow)

Policy Num	Insured Last	First Name	City	State	Zip Code	Phone	Birth Date	Product	Issue Age	Effective Date	Status	Agent No	Agent
123456789	Brown	Larry	Jacksonville	FL	32246					04/28/2011	Inforce	123456	Molly Marketer
234567890					33647					02/10/2015	Inforce	123456	Molly Marketer
345678901	Grey				32223					08/18/2020	Inforce	123456	Molly Marketer
456789012	Black				32223					08/18/2020	Inforce	123456	Molly Marketer
4567890123	Tanner				32223					08/18/2020	Inforce	123456	Molly Marketer ...

Policy Details

The Policy Detail screen reflects values as of the prior month-a-versary.

123456 – Isabelle M. Insured - Final Expense (as of 06/04/2021)

Plan					Status	
Product	Final Expense				Status	Inforce
Base Face Value	\$5,000.00				Issue Date	07/15/2019
Total Annualized Premium	\$284.58				Effective Date	07/10/2019
Age at Issue	67				Maturity Date	07/10/2073
Paid to Date					07/10/2021	
Coverages						
Coverage	Face Value	Modal	Annualized	Maturity Date		
Elite (Full)	\$5,000.00	\$284.58	\$284.58	07/10/2073		
Billing Details						
Frequency	Yearly	Billing Type	Direct Bill			
Modal Premium	\$284.58					
Payment History						
Date Paid	Due Date	Amount	Source	Status		
07/20/2020	07/10/2020	284.58	Lockbox	Paid		
08/28/2019	07/10/2019	284.58	CASH	Paid		
Owner						
Name	Isabelle M. Insured					
Address	123 Main Street Anywhere, IL 12345					
Phone	(123) 456-7890					
Insured						
Name	Isabelle M. Insured					
Gender	Female					
Smoker	N					
Date of Birth	11/15/1951					
Attained Age	69					
Payer						
Name	Isabelle M. Insured					
Address	123 Main Street Anywhere, IL 12345					
Phone	(123) 456-7890					
Beneficiaries						
Order	Percent	Name				
Primary	not specified	Benjamin Beneficiary				
Primary	not specified	Brenda Beneficiary				