



# Partners Website Guide

## A USER GUIDE TO COLUMBIAN'S AGENT WEBSITE

Form No. 6068-CL (Rev. 5/21)  
For agent use only. Not for use with consumers.

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## Introduction

Partners is Columbian's secure website for agents to 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

If you already have a login to the Partners Website [click here](#) or go to [cflife.com](http://cflife.com) and click on [Producer Login](#), then [Login to Partners Website](#).

Please Log In

User ID:

Password:

By choosing Log In, you agree to the terms of the [CFG Confidentiality of Information Agreement](#).

[Not registered? Enroll here!](#)

[Forget your password? Reset here!](#) Click here if you forget your password

If you do not have a login, [click here](#) or go to [www.cflife.com/partners/login/identify](http://www.cflife.com/partners/login/identify). Enter the first six digits of your Columbian Agent Number, the last four digits of your tax ID, and one additional piece of identifying information: date of birth, zip code, telephone number or email address.

User Enrollment

Please help us to identify you

First SIX digits of CFG Agent Number: \*  Enter only the first six digits of your agent number.

Last four digits of tax ID: \*

Select and provide one additional piece of identifying information

Date of birth (mm/dd/yyyy): \*  Date of birth, zip code, phone number or email address

Continue to set up your user ID and password.

Fields where entry is required are marked with an asterisk \* and a yellow background.

Once you've registered, you'll set up your user ID and password for future logins.

## 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 Agent 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 Agent Home page for Sam Smith at Smith Funeral Home. The page includes a navigation menu, a search bar, and several sections for managing applications and viewing details.

**Callout Boxes:**

- Change your email address here**: Points to the "Change it!" link next to the email address.
- Change your profile here**: Points to the "PROFILE" link in the top right.
- Send us a message**: Points to the "CONTACT US" link in the top right.
- News & Alerts will show here**: Points to the "Agent Home" section.
- View commission payment details**: Points to the "View Deposit" section.
- Click any link for details**: Points to a link in the "Application History" table.
- Your pending applications**: Points to the "Applications Pending" section.
- Any action needed on a pending application will be shown here**: Points to the "Action Needed" row in the pending applications table.

|  | Week<br>09/24/2020 - 09/30/2020 |         |          | Last 30 Days<br>09/01/2020 - 09/30/2020 |          |          | Year to Date<br>01/01/2020 - 09/30/2020 |           |           | Since Inception<br>01/01/1900 - 09/30/2020 |            |            |
|--|---------------------------------|---------|----------|---|----------|----------|---|-----------|-----------|--|------------|------------|
|  | Count                           | Premium | Face Amt | Count                                   | Premium  | Face Amt | Count                                   | Premium   | Face Amt  | Count                                      | Premium    | Face Amt   |
| <b>Submitted (Based on submission date.)</b>         |                                 |         |          |   |          |          |   |           |           |  |            |            |
| Accepted   | 0                               | 0.00    | 0.00     | 1                                       | 3,160.95 | 3,192.88 | 22                                      | 69,520.72 | 70,396.19 | 192  | 909,180.40 | 925,895.23 |
| Unissued   | 0                               | 0.00    | 0.00     | 0                                       | 0.00     | 0.00     | 1                                       | 2,443.00  | 2,505.64  | 1  | 2,443.00   | 2,505.64   |
| <b>Issued &amp; Paid (Based on production date.)</b> |                                 |         |          |   |          |          |   |           |           |  |            |            |
| Issued & Paid  | 0                               | 0.00    | 0.00     | 1                                       | 3,160.95 | 3,192.88 | 22                                      | 69,520.72 | 70,396.19 | 192  | 911,623.40 | 928,400.87 |
| Not Taken  | 0                               | 0.00    | 0.00     | 0                                       | 0.00     | 0.00     | 1                                       | 2,443.00  | 2,505.64  | 1  | 2,443.00   | 2,505.64   |
| Net Issued & Paid                                    | 0                               | 0.00    | 0.00     | 1                                       | 3,160.95 | 3,192.88 | 22                                      | 69,520.72 | 70,396.19 | 192  | 909,180.40 | 925,895.23 |

## Contact Us

To send a secure email to the Preneed Team, click the Contact Us link at the top of the page and complete the 'Contact Us' form. Indicate your preference for the reply method (phone or fax) and include your phone or fax number as appropriate.

## 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 has been posted since the last time you logged in
- General announcements from the Company

The screenshot shows a news alert in the "Agent Home" section. A callout box points to a link in the alert text.

**Callout Boxes:**

- Important notices from the Company will show here**: Points to the "Agent Home" section.
- Click a link to view any unread bulletin or to access any new or revised forms**: Points to the "Click here" link in the news alert.

**News Alert:**

Policyholders living in the 16 parishes affected by Hurricane Laura will receive an extension of the moratorium on policy lapses for non-payment of premium extends to October 24, 2020. Cameron, Grant, Jackson, Jefferson Davis, Lincoln, Natchitoches, Ouachita, Rapides, Sabine, and St. Landry parishes. [Click here](#) to view.

**News Section:**

107 forms have been added or revised. [Click here](#) to view.

## 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**

Aug 28, 2020 315827-001 \$212.84 Get Detail

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**View Deposit**

2020-08-28 Get Detail

Use drop downs 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<br>08/27/2020 - 08/31/2020 |          |          | Last 30 Days<br>08/02/2020 - 08/31/2020 |          |          | Year to Date<br>01/01/2020 - 08/31/2020 |           |           | Since Inception<br>01/01/1900 - 08/31/2020 |            |            |
|  | Count                           | Premium  | Face Amt | Count                                   | Premium  | Face Amt | Count                                   | Premium   | Face Amt  | Count                                      | Premium    | Face Amt   |
| <b>Submitted (Based on submission date.)</b>         |                                 |          |          |   |          |          |   |           |           |  |            |            |
| Accepted   | <u>1</u>                        | 2,655.47 | 2,674.19 | <u>7</u>                                |          |          |   |           |           |  | 906,019.45 | 922,702.35 |
| Unissued   | 0                               | 0.00     | 0.00     | 0                                       |          |          |   |           |           |  | 2,443.00   | 2,505.64   |
| <b>Issued &amp; Paid (Based on production date.)</b> |                                 |          |          |   |          |          |   |           |           |  |            |            |
| 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 | 925,207.99 |
| 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   | 2,505.64   |
| 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 | 922,702.35 |

Click on any green underlined item for details

## 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 |
|  | <a href="#">123456789</a> | Walter White | 2,281.00           | 2,283.28    | 1.0          | 08/06/2020 | 08/06/2020 | 08/05/2020 | 08/05/2038 | Inforce | Business Builder SP | Full    |
|  | <a href="#">234567890</a> | Earl Grey    |                    |             |              | 08/06/2020 | 08/06/2020 | 08/05/2020 | 08/05/2043 | Inforce | Business Builder SP | Full    |
|  | <a href="#">345678901</a> | Sam Green    | 593.00             | 608.21      | 1.0          | 08/18/2020 | 08/18/2020 | 08/18/2020 | 08/18/2052 | Inforce | Business Builder SP | Full    |
|  | <a href="#">456789012</a> | Violet Hue   | 614.22             | 618.55      | 1.0          | 08/18/2020 | 08/18/2020 | 08/18/2020 | 08/18/2045 | Inforce | Business Builder SP | Full    |
|  | <a href="#">567890123</a> | Lewis Black  | 614.22             | 620.42      | 1.0          | 08/18/2020 | 08/18/2020 | 08/18/2020 | 08/18/2046 | Inforce | Business Builder SP | Full    |
|  | <a href="#">678901234</a> | Red Buttons  | 614.22             | 620.42      | 1.0          | 08/18/2020 | 08/18/2020 | 08/18/2020 | 08/18/2047 | Inforce | Business Builder SP | Full    |
|  | <a href="#">78901234</a>  | Bert Brown   | 2,655.47           | 2,674.19    | 1.0          | 08/28/2020 | 08/28/2020 | 08/27/2020 | 08/27/2043 | Inforce | Business Builder SP | Full    |

Click on a policy number for policy details

## Applications Pending

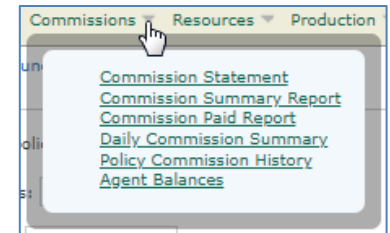
When an application is being processed, it will be shown as 'Proceeding.' If any action is needed before the policy can be issued, it will be listed as 'Action Needed' and any requirements will be shown.

| Applications Pending |   |   |
|----------------------|---|---|
| Proceeding           | 0 | - |
| Action Needed        |   | - |

Any action needed will be shown here

## 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:

| Account   | Payment       |
|---|---------------|
| <input checked="" type="radio"/> 001 - Smith Funeral Home | Check Monthly |

Report Dates:

current activity  
 08/31/2020  
 07/31/2020  
 06/30/2020

Click on a specific date or use the Shift key to select a range of dates.

*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)

Make your selection, then click Request Report

[Request Report](#)

### Commission Summary Report

Click for:

[Print version / PDF](#)

[XML](#)

Report can be printed or downloaded

**Commission Summary for Smith Funeral Home (012345)**

| Description |                                |   | 08/01/2020 - 08/31/2020 | Month To Date | Year To Date |
|-------------|--------------------------------|---|-------------------------|---------------|--------------|
|             | Beginning Balance              | + | 0.00                    | 0.00          | 0.00         |
| Plus        | First Year Commission          | + | 1,011.05                | 1,011.05      | 8,042.27     |
| Plus        | Renewal Life Commission        | + | 17.84                   | 17.84         | 828.03       |
| Less        | Reserve Account Deposits       | - | -257.24                 | -257.24       | -1,512.83    |
| Less        | Early Termination Chargebacks  | - | 0.00                    | 0.00          | -620.94      |
| Plus        | Recovered From Reserve Account | + | 0.00                    | 0.00          | 620.94       |
| Less        | Quick Pays/Immediate Checks    | - | -771.65                 | -771.65       | -7,357.47    |
| Equals      | Balance Due Agent              | = | 0.00                    | 0.00          | 0.00         |
|             | Beginning Advance Balance      | + | 0.00                    | 0.00          | 0.00         |
| Equals      | Ending Advance Balance         | = | 0.00                    | 0.00          | 0.00         |
|             | Beginning All Payment Plans    | + | 0.00                    | 0.00          | 0.00         |
| Equals      | Payment Plan Balance           | = | 0.00                    | 0.00          | 0.00         |
|             | Beginning Reserve Account      | + | 2,631.52                | 2,631.52      | 1,996.87     |
| Plus        | Reserve Account Deposits       | + | 257.24                  | 257.24        | 1,512.83     |
| Less        | Reserve Account Charges        | - | 0.00                    | 0.00          | -620.94      |
| Equals      | Reserve Account Balance        | = | 2,888.76                | 2,888.76      | 2,888.76     |

## Commission Statement Details

In addition to the Commission Statement summary, you may also view two levels of detail.

|   |  |
|---|--|
| <b>Commission Statement:</b>                | <a href="#">Summary</a> • <a href="#">Details</a> • <a href="#">Extended Details</a> |
| <b>Commission Statement without Repaid:</b> | <a href="#">Details</a> • <a href="#">Extended Details</a>                           |
| <b>Commission Statement As Earned:</b>      | <a href="#">Details</a> • <a href="#">Extended Details</a>                           |

Click Details or Extended Details to generate the statement

## Details Report

The Details report includes policy numbers, insured names and commission breakout details.

| Policy Number | Insured Name     | Total Commissionable |        | Payable Type | Amount Payable | Retained Type | Amount Retained | Net Amount Payable |
|---------------|------------------|----------------------|--------|--------------|----------------|---------------|-----------------|--------------------|
|               |                  | Amount               | Rate   |              |                |               |                 |                    |
| 0123456       | Walter White     | 252.02               | 2.50%  | Single       | 6.30           | Com 2 Resv    | -1.58           | 4.72               |
| 1234567       | William Brown    | 256.41               | 4.50%  | Single       | 11.54          | Com 2 Resv    | -2.89           | 8.65               |
| 2345678       | Jade Green       | 300.30               | 4.50%  | Single       | 13.51          | Com 2 Resv    | -3.38           | 10.13              |
| 3456789       | Yasmine Yellow   | 300.30               | 1.00%  | Single       | 3.00           | Com 2 Resv    | -0.75           | 2.25               |
| 4567890       | Earl Grey        | 2,283.28             | 4.50%  | Single       | 102.75         | Com 2 Resv    | -25.69          | 77.06              |
| 5678901       | Francine Fuschia | 2,297.08             | 10.50% | Single       | 241.19         | Com 2 Resv    | -60.30          | 180.89             |
| 6789101       | Paula Pink       | 608.21               | 18.50% | Single       | 112.52         | Com 2 Resv    | -28.13          | 84.39              |
| 7890123       | Oliver Orange    | 618.55               | 10.50% | Single       | 64.95          | Com 2 Resv    | -16.24          | 48.71              |
| 8901234       | Deepak Purple    | 620.42               | 15.50% | Single       | 96.17          | Com 2 Resv    | -24.04          | 72.13              |
| 9012345       | Barry Blue       | 620.42               | 15.50% | Single       | 96.17          | Com 2 Resv    | -24.04          | 72.13              |
| 9876543       | Randolf Red      | 2,674.19             | 10.50% | Single       | 280.79         | Com 2 Resv    | -70.20          | 210.59             |
| n/a           |                  |                      |        | Quick Pay    | -257.95        |               |                 | -257.95            |
| n/a           |                  |                      |        | Quick Pay    | -13.37         |               |                 | -13.37             |
| n/a           |                  |                      |        | Quick Pay    | -277.36        |               |                 | -277.36            |
| n/a           |                  |                      |        | Quick Pay    | -212.84        |               |                 | -212.84            |
| n/a           |                  |                      |        | Quick Pay    | -10.13         |               |                 | -10.13             |

## Extended Details Report

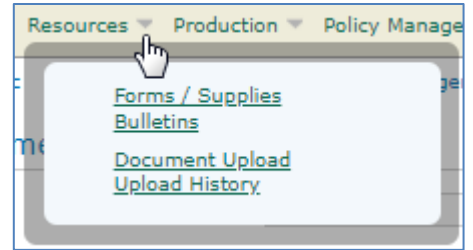
The Extended Details report includes all of the above, plus issue ages, plans issued, policy dates, paid-to dates, dates paid, billing methods and commission rates.

| Policy Number | Insured Name     | Issue Age | Product Version | Policy Date | Paid To Date | Date Paid  | Billing Method | Total Commissionable |        | Split Commissionable |          | Payable Type | Amount Payable | Retained Type | Amount Retained | Net Amount Payable |
|---------------|------------------|-----------|-----------------|-------------|--------------|------------|----------------|----------------------|--------|----------------------|----------|--------------|----------------|---------------|-----------------|--------------------|
|               |                  |           |                 |             |              |            |                | Amount               | Rate   | Split%               | Amount   |              |                |               |                 |                    |
| 0123456       | Walter White     | 84        | SP-T            | 08/07/2020  | 05/30/2034   | 08/17/2020 | 252.02/1       | 252.02               | 2.50%  | 100.00%              | 252.02   | Single       | 6.30           | Com 2 Resv    | -1.58           | 4.72               |
| 1234567       | William Brown    | 82        | SP-T            | 08/07/2020  | 05/30/2036   | 08/17/2020 | 256.41/1       | 256.41               | 4.50%  | 100.00%              | 256.41   | Single       | 11.54          | Com 2 Resv    | -2.89           | 8.65               |
| 2345678       | Jade Green       | 82        | SP-BB           | 08/19/2020  | 07/30/2038   | 08/31/2020 | 300.30/1       | 300.30               | 4.50%  | 100.00%              | 300.30   | Single       | 13.51          | Com 2 Resv    | -3.38           | 10.13              |
| 3456789       | Yasmine Yellow   | 85        | SP-BB           | 08/20/2020  | 07/30/2035   | 08/28/2020 | 300.30/1       | 300.30               | 1.00%  | 100.00%              | 300.30   | Single       | 3.00           | Com 2 Resv    | -0.75           | 2.25               |
| 4567890       | Earl Grey        | 82        | SP-BB           | 08/05/2020  | 08/05/2038   | 08/06/2020 | 2,283.28/1     | 2,283.28             | 4.50%  | 100.00%              | 2,283.28 | Single       | 102.75         | Com 2 Resv    | -25.69          | 77.06              |
| 5678901       | Francine Fuschia | 77        | SP-BB           | 08/05/2020  | 08/05/2043   | 08/06/2020 | 2,297.08/1     | 2,297.08             | 10.50% | 100.00%              | 2,297.08 | Single       | 241.19         | Com 2 Resv    | -60.30          | 180.89             |
| 6789012       | Paula Pink       | 68        | SP-BB           | 08/18/2020  | 08/18/2052   | 08/18/2020 | 608.21/1       | 608.21               | 18.50% | 100.00%              | 608.21   | Single       | 112.52         | Com 2 Resv    | -28.13          | 84.39              |
| 7890123       | Oliver Orange    | 75        | SP-BB           | 08/18/2020  | 08/18/2045   | 08/18/2020 | 618.55/1       | 618.55               | 10.50% | 100.00%              | 618.55   | Single       | 64.95          | Com 2 Resv    | -16.24          | 48.71              |
| 8901234       | Deepak Purple    | 74        | SP-BB           | 08/18/2020  | 08/18/2046   | 08/18/2020 | 620.42/1       | 620.42               | 15.50% | 100.00%              | 620.42   | Single       | 96.17          | Com 2 Resv    | -24.04          | 72.13              |
| 9012345       | Barry Blue       | 73        | SP-BB           | 08/18/2020  | 08/18/2047   | 08/18/2020 | 620.42/1       | 620.42               | 15.50% | 100.00%              | 620.42   | Single       | 96.17          | Com 2 Resv    | -24.04          | 72.13              |
| 9876543       | Randolf Red      | 77        | SP-BB           | 08/27/2020  | 08/27/2043   | 08/28/2020 | 2,674.19/1     | 2,674.19             | 10.50% | 100.00%              | 2,674.19 | Single       | 280.79         | Com 2 Resv    | -70.20          | 210.59             |
| n/a           |                  |           |                 |             |              | 08/06/2020 |                |                      |        |                      |          | Quick Pay    | -257.95        |               |                 | -257.95            |
| n/a           |                  |           |                 |             |              | 08/17/2020 |                |                      |        |                      |          | Quick Pay    | -13.37         |               |                 | -13.37             |
| n/a           |                  |           |                 |             |              | 08/18/2020 |                |                      |        |                      |          | Quick Pay    | -277.36        |               |                 | -277.36            |
| n/a           |                  |           |                 |             |              | 08/28/2020 |                |                      |        |                      |          | Quick Pay    | -212.84        |               |                 | -212.84            |
| n/a           |                  |           |                 |             |              | 08/31/2020 |                |                      |        |                      |          | Quick Pay    | -10.13         |               |                 | -10.13             |



## 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.

**Preneed Forms: OH**  
**Instructions:** You can filter the list of forms by typing criteria into one or more of the fields:

Form Number  Title  Category

| Form Number                                       | Title  | Date       | Category  | Size         |
|---|--|------------|-----------|--------------|
| <a href="#">5139CFG</a>                           | <a href="#">Agent Balance Fax Check Authorization Form</a>   | 04/01/2019 | Forms     | 8.5 x 11 in. |
| <a href="#">A359G-CL fillable</a>                 | <a href="#">Application - Multi Pay</a>                      | 04/12/2017 | Forms     | 8.5 x 11 in. |
| <a href="#">A355G-</a>                            | <a href="#">Application - Single Pay</a>                     |            | Forms     | 8.5 x 11 in. |
| <a href="#">A216CF</a>                            | <a href="#">Application for Policy Change Form Part I</a>    |            | Forms     | 8.5 x 11 in. |
| <a href="#">1840-CL (rev. 05/2011)</a>            | <a href="#">Assignment Form</a>                              | 07/02/2011 | Forms     | 8.5 x 11 in. |
| <a href="#">5437CFG</a>                           | <a href="#">Designation and Name Change Form</a>             | 12/12/2019 | Forms     | 8.5 x 11 in. |
| <a href="#">5117CFG (REV 11.19)</a>               | <a href="#">Direct Deposit authorization for Commissions</a> | 11/26/2019 | Forms     | 8.5 x 11 in. |
| <a href="#">6233-CL</a>                           | <a href="#">Early Payoff Brochure</a>                        | 08/19/2020 | Reference | 8.5 x 11 in. |
| <a href="#">4740CFG</a>                           | <a href="#">EFT Account Verification Form</a>                | 10/16/2009 | Forms     | 8.5 x 11 in. |
| <a href="#">1552CFG (REV 7.20) (rev. 07/2020)</a> | <a href="#">EFT Request Form</a>                             | 07/10/2020 | Forms     | 8.5 x 11 in. |
| <a href="#">3124-CL-OH (rev. 05/2017)</a>         | <a href="#">Express Reference Guide</a>                      | 06/01/2017 | Reference | 8.5 x 11 in. |

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

**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       |
|------------------------------|---|------------|
| <a href="#">CLIC-20-2659</a> | <a href="#">Preneed Marketing Forms and DocuSign</a>                    | 08/19/2020 |
| <a href="#">CLIC-20-2657</a> | <a href="#">New Hampshire Preneed Disclosure Requirements</a>           | 05/12/2020 |
| <a href="#">CLIC-20-2655</a> | <a href="#">Company Position Regarding Replacements</a>                 | 05/11/2020 |
| <a href="#">CFG-20-2654</a>  | <a href="#">Advertising Practices and Procedures</a>                    | 04/27/2020 |
| <a href="#">CLIC-19-2614</a> | <a href="#">Massachusetts Preneed Buyer's Guide</a>                     | 05/17/2019 |
| <a href="#">CFG-19-2604</a>  | <a href="#">Preneed Now Available Through Columbian Life in Vermont</a> | 03/20/2019 |
| <a href="#">CLIC-19-2605</a> | <a href="#">New Preneed Application for Nevada</a>                      | 02/27/2019 |
| <a href="#">CFG-19-2606</a>  | <a href="#">Advertising Practices and Procedures</a>                    | 02/21/2019 |

**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 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.

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: 123456 Smith Funeral Home  
 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: Commission Administration ▼

Document Type: Commission Administration  
Customer Service  
New Business - Preneed  
Premium Administration

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:

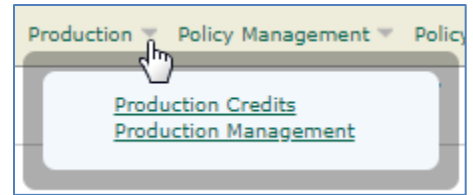
## Upload History

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

| Received                            | Sent To      | Product | Insured   |
|-------------------------------------|--------------|---------|-----------|
| <a href="#">08/04/2017 11:22 AM</a> | New Business | Preneed | Doe, John |
| <a href="#">08/04/2017 11:03 AM</a> | New Business | Preneed | Doe, Jane |

## 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.

Smith Funeral Home      CFG Agent: 123456      Market Class: Preeed

Agent Production Credits

Production Credits

1 January 2020 to 30 September 2020 (274 days) Update >> Remove this block

| Personal Credits  |       |           |           | Managed Credits   |       |           |           |
|-------------------|-------|-----------|-----------|-------------------|-------|-----------|-----------|
|                   | Count | Premium   | Face Amt  |                   | Count | Premium   | Face Amt  |
| Submitted         | 23.0  | 71,963.72 | 72,901.83 | Submitted         | 4.0   | 25,046.75 | 25,149.89 |
| Issued & Paid     | 23.0  | 71,963.72 | 72,901.83 | Issued & Paid     | 4.0   | 25,046.75 | 25,149.89 |
| Not Taken         | 1.0   | 2,443.00  | 2,505.64  | Not Taken         | 0.0   | 0.00      | 0.00      |
| Net Issued & Paid | 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   |       |         |          |
|-------------------|-------|----------|----------|-------------------|-------|---------|----------|
|                   | Count | Premium  | Face Amt |                   | Count | Premium | Face Amt |
| Submitted         | 1.0   | 3,160.95 | 3,192.88 | Submitted         | 0.0   | 0.00    | 0.00     |
| Issued & Paid     | 1.0   | 3,160.95 | 3,192.88 | Issued & Paid     | 0.0   | 0.00    | 0.00     |
| Not Taken         | 0.0   | 0.00     | 0.00     | Not Taken         | 0.0   | 0.00    | 0.00     |
| Net Issued & Paid | 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   |       |         |          |
|-------------------|-------|---------|----------|-------------------|-------|---------|----------|
|                   | Count | Premium | Face Amt |                   | Count | Premium | Face Amt |
| Submitted         | 0.0   | 0.00    | 0.00     | Submitted         | 0.0   | 0.00    | 0.00     |
| Issued & Paid     | 0.0   | 0.00    | 0.00     | Issued & Paid     | 0.0   | 0.00    | 0.00     |
| Not Taken         | 0.0   | 0.00    | 0.00     | Not Taken         | 0.0   | 0.00    | 0.00     |
| Net Issued & Paid | 0.0   | 0.00    | 0.00     | Net Issued & Paid | 0.0   | 0.00    | 0.00     |

22 October 2020 to 21 October 2020 Add dates >>

**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.**

### Managed Agent Production Reports

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

Managed Agent Production

123456 Smith Funeral Home Inc - Office

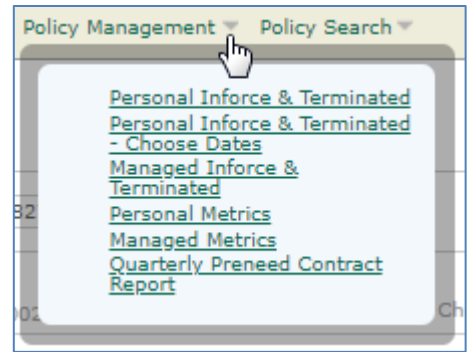
2 October 2019 to 30 September 2020 (365 days) Set dates >>

| Agent                         | Submitted |            |            | Issued & Paid |            |            | NT/Issued | Not Taken |          |          | Net Issued |            |            |
|-------------------------------|-----------|------------|------------|---------------|------------|------------|-----------|-----------|----------|----------|------------|------------|------------|
|                               | Policies  | Premium    | Face Amt   | Policies      | Premium    | Face Amt   |           | Policies  | Premium  | Face Amt | Policies   | Premium    | Face Amt   |
| <b>Total</b>                  | 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 Smith Funeral Home Inc | 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  |

**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, Agent Metrics and Preneed Contract Reports. Managers can view reports for personal or managed business.



## Inforce & Terminated Reports

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

Smith Funeral Home CFG Agent: 123456 Market Class: **Preneed**

Click for: [Print version / PDF](#) [XML](#) This report can be downloaded to a PDF file or to a spreadsheet.

Inforce & Terminated (Personal Production): Smith Funeral Home (123456) \$638,805

As Of Date:  (mm/dd/yyyy)

[Update](#)

| Policy Year               | Submitted      | Not Taken    | Declined    | Rescinded | Deaths      | Lapsed   | Incomplete  | Matured  | Inforce        |
|---------------------------|----------------|--------------|-------------|-----------|-------------|----------|-------------|----------|----------------|
| <b>Policy Counts</b>      |                |              |             |           |             |          |             |          |                |
| 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             |
| <b>Total</b>              | <b>126</b>     | <b>1</b>     | <b>0.8%</b> | <b>0</b>  | <b>0.0%</b> | <b>0</b> | <b>0.0%</b> | <b>0</b> | <b>94</b>      |
| <b>Annualized Premium</b> |                |              |             |           |             |          |             |          |                |
| 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         |
| <b>Total</b>              | <b>638,805</b> | <b>2,443</b> | <b>0.4%</b> | <b>0</b>  | <b>0.0%</b> | <b>0</b> | <b>0.0%</b> | <b>0</b> | <b>478,915</b> |

## 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.

Agent Metrics Report, Personal Production, Smith Funeral Home (123456)  
Data as of 09/30/2020

Target Metrics

|                    | 12 Month Premium Paying Persistency | 24 Month Premium Paying Persistency | Placement Ratio | Rescission Ratio |
|--------------------|-------------------------------------|-------------------------------------|-----------------|------------------|
| PRENEED MULTIPAY   | 87%                                 | 80%                                 | 98%             | 0%               |
| PRENEED SINGLE PAY | 87%                                 | 79%                                 | 100%            | 0%               |
| PRENEED ANNUITY    | 66%                                 | 50%                                 | 100%            | 0%               |

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 | ETF & 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 MULTIPAY   | All        | 100%                                | A     | 100%                                | A     | 100%            | A     | 0%               | A     | 1                      | 0         | 0                             | 1               | 1                               | 0                          | 1  | 1                                       | 1  | 1                                       | 0                                | 0                 | 0                |
| 123456   |            | PRENEED SINGLE PAY | All        | 88%                                 | B     | 82%                                 | B     | 99%             | B     | 0%               | A     | 172                    | 1         | 0                             | 171             | 121                             | 0                          | 148                                      | 130                                     | 115                                      | 94                                      | 29                               | 0                 | 0                |
| 123456   |            | PRENEED ANNUITY    | All        | 89%                                 | A     | 62%                                 | A     | 100%            | A     | 0%               | A     | 21                     | 0         | 0                             | 21              | 8                               | 0                          | 18                                       | 16                                      | 16                                       | 10                                      | 0                                | 0                 | 0                |

## Quarterly Preneed Contract Report


To generate a Preneed report, select the Quarterly Preneed Contract Report link from the Policy Management drop down menu. Enter the start and end date and select the issue state (if desired), then select Get Report.

**Quarterly Preneed Contract Report**


From Date:  (MM/DD/YYYY)

To Date:  (MM/DD/YYYY)

Issue States:

 **Get Report**

The downloadable report will include the contract policy number, contract date, amount, and the name and address of the contract recipient and contract purchaser.

Click for:  CSV

Click to download to an Excel spreadsheet.


Quarterly Preneed Contract Report

10 record(s) found

From Date:  (MM/DD/YYYY)

To Date:  (MM/DD/YYYY)

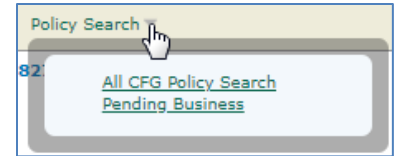
Issue States:

 **Get Report**

| Contract Policy Number | Contract Date | Contract Amount | Deposit Amount | Recipient Last Name | Recipient First Name | Recipient Address_1 | Recipient Address_2 | Recipient City | Recipient State | Recipient Zip Code | Recipient Telephone | Purchaser Last Name | Purchaser First Name | Purchaser Address_1 | Purchaser Address_2 | Purchaser City | Purchaser State | Purchaser Zip Code | Purchaser Telephone |
|------------------------|---------------|-----------------|----------------|---------------------|----------------------|---------------------|---------------------|----------------|-----------------|--------------------|---------------------|---------------------|----------------------|---------------------|---------------------|----------------|-----------------|--------------------|---------------------|
| 1234567890             | 07/31/2020    | 1,285.64        | 1,884.35       | Brown               | Barbara              | 123 Main St         |                     | Santa Barbara  | CA              | 93108              |                     | Brown               | Barbara              | 123 Main St         |                     | Santa Barbara  | CA              | 93108              |                     |
| 2345678901             | 07/31/2020    | 1,285.64        | 1,884.35       | Brown               | Mark                 | 123 Main St         |                     | Santa Barbara  | CA              | 93108              |                     | Brown               | Mark                 | 123 Main St         |                     | Santa Barbara  | CA              | 93108              |                     |
| 3456789012             | 08/06/2020    | 2,283.28        | 2,281.00       | Black               | Robert               | 123 Main St         |                     | Savannah       | GA              | 31419              |                     | Black               | Robert               | 123 Main St         |                     | Savannah       | GA              | 31419              |                     |
| 4567890123             | 08/06/2020    | 2,297.08        | 2,281.00       | Black               | Peggy                | 123 Oak St          |                     | Savannah       | GA              | 31419              |                     | Black               | Peggy                | 123 Oak St          |                     | Savannah       | GA              | 31419              |                     |
| 5678901234             | 08/18/2020    | 608.21          | 593.00         | Black               | Constance            | 123 Oak St          |                     | Arden          | NC              | 28704              |                     | Black               | William              | 123 Oak St          |                     | Arden          | NC              | 28704              |                     |
| 6789012345             | 08/18/2020    | 618.55          | 814.22         | Green               | Harvey               | 123 Elm St          |                     | Jacksonville   | FL              | 32223              |                     | Green               | Harvey               | 123 Elm St          |                     | Jacksonville   | FL              | 32223              |                     |
| 7890123456             | 08/18/2020    | 620.42          | 814.22         | Green               | Sharon               | 123 Elm St          |                     | Jacksonville   | FL              | 32223              |                     | Green               | Sharon               | 123 Elm St          |                     | Jacksonville   | FL              | 32223              |                     |
| 8901234567             | 08/18/2020    | 620.42          | 814.22         | Smith               | Donna                | 123 Maple St        |                     | Jacksonville   | FL              | 32223              |                     | Smith               | Donna                | 123 Maple St        |                     | Jacksonville   | FL              | 32223              |                     |
| 9012345678             | 08/28/2020    | 2,674.19        | 2,655.47       | Doe                 | Ki Cha               | 123 Sycamore Dr     |                     | Savannah       | GA              | 31419              |                     | Doe                 | Jessica              | 123 Sycamore Dr     |                     | Savannah       | GA              | 31419              |                     |
| 0123456789             | 09/14/2020    | 3,192.88        | 3,160.95       | Grey                | Karen                | 123 Pine Dr         |                     | Savannah       | GA              | 31419              |                     | Grey                | Karen                | 123 Pine Dr         |                     | Savannah       | GA              | 31419              |                     |

## 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    |       | 12/13/1949 | Single-pay Preneed | 62        | 04/28/2011     | Inforce | 123456   | Smith Funeral Home |
| 234567890  |              |            |              |       | 33647    |       | 04/05/1933 | Single-pay Preneed | 82        | 02/10/2015     | Inforce | 123456   | Smith Funeral Home |
| 345678901  | Grey         |            |              |       | 32223    |       | 01/02/1946 | Single-pay Preneed | 75        | 08/18/2020     | Inforce | 123456   | Smith Funeral Home |
| 456789012  | Black        |            |              |       | 32223    |       | 06/07/1946 | Single-pay Preneed | 74        | 08/18/2020     | Inforce | 123456   | Smith Funeral Home |
| 4567890123 | Tanner       |            |              |       | 32223    |       | 11/12/1946 | Single-pay Preneed | 73        | 08/18/2020     | Inforce | 123456   | Smith Funeral Home |

### Policy Details

The Policy Detail screen reflects values as of the prior month-a-versary. For current values, contact the Preneed Team at 800-423-9165, extension \*5905.

123456789 - Larry Brown - Single-pay Preneed (as of 09/30/2020)

**Plan**

Product: Single-pay Preneed  
 Base Face Value: \$4,736.84  
 Total Annualized Premium: \$6,500.00  
 Age at Issue: 62

**Coverages**

| Coverage                   | Face Value | Maturity Date |
|----------------------------|------------|---------------|
| Business Builder SP        | \$4,736.84 | 04/28/2049    |
| PN SP FA Growth            | \$116.85   | 04/28/2049    |
| PN SP FA Growth            | \$126.32   | 04/28/2049    |
| PN SP FA Growth            | \$644.21   | 04/28/2049    |
| CLIC BB Additional Deposit | \$1,052.63 | 04/28/2049    |

**Billing Details**  
Policy no recurring payments

**Payment History**

| Date Paid  | Due Date   | Amount   | Source | Status |
|------------|------------|----------|--------|--------|
| 07/24/2012 | 07/24/2012 | 1,000.00 | CASH   | Paid   |
| 02/14/2012 | 02/14/2012 | 1,000.00 | CASH   | Paid   |
| 04/28/2011 | 04/28/2011 | 4,500.00 | CASH   | Paid   |

**Status**

Status: Inforce  
 Issue Date: 04/28/2011  
 Effective Date: 04/28/2011  
 Maturity Date: 04/28/2049  
 Paid to Date: 04/28/2049

**Owner**

Name: Larry Brown  
 Address: 123 Main St  
 Anywhere, GA 12345

**Insured**

Name: Larry Brown  
 Gender: Male  
 Date of Birth: 06/07/1949  
 Attained Age: 71

**Payer**

Name: Larry Brown  
 Address: 123 Main St  
 Anywhere, GA 12345

**Beneficiaries**

| Order   | Percent | Name               |
|---------|---------|--------------------|
| Primary | 100%    | Smith Funeral Home |

**Participating Agents**

123456-001 Smith Funeral Home  
[Commission History](#)

**Other Roles**

83 Assignee (Absolute) CFG Trust  
 84 Third Party Designee Mary Brown

Click here to view commission history for the policy.