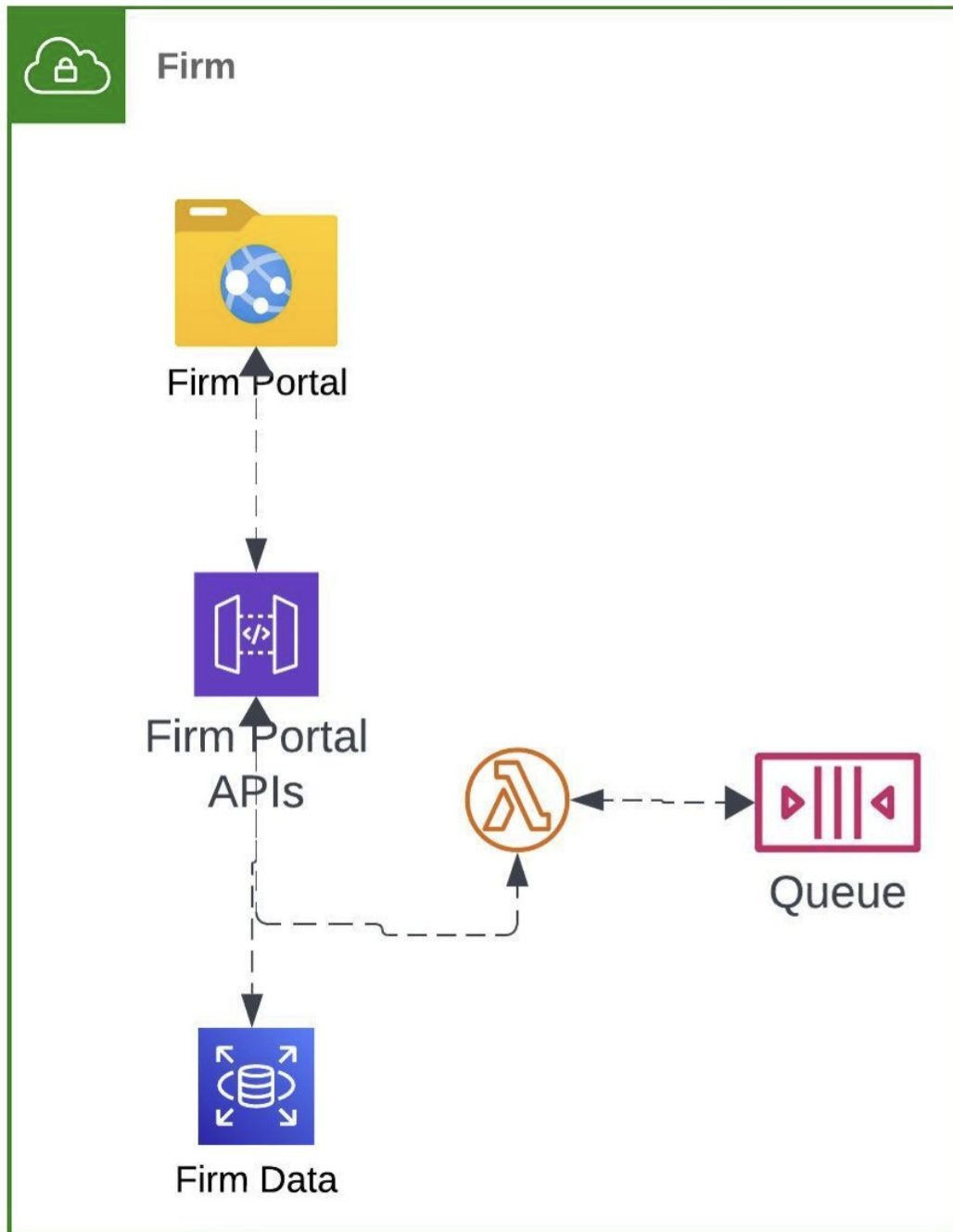|	
From:	Samual Sines <ssines@lumafintech.com>
Sent:	Thursday, February 13, 2025 10:24 AM
To:	Begley, Kevin N; Ayesha Vaphides; Booth, JoAnn; Chaganti, Rajasekhar; Dhanasekaran, Obuli Sankar; Hannah Pikus; Jacob Huiet; Jon W. Volpe (JVolpe@dtcc.com); mpaul02 @newyorklife.com; Naramreddy, Pramod; Samuvel_Gnanaolivu@nylim. com (Samuvel_Gnanaolivu@nylim.com); Scott Bair
Subject:	[External] Re: Business Case - The Big Bene Theory 2.12.25.pptx

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Screenshots from today, and the FIGMA link. So fun working with all of you!
https://www.figma.com/design/Ueq0lVj5zDjGpW10hg3JWF/Hackathon?node-id=81-4626&t=HPecqSjmxXXJp5QP-0
and lucidchart:
https://lucid.app/publicSegments/view/9de48245-b118-46a5-b4dd-71e6a507f5a9/image.jpeg

Firm

Firm Portal

Firm Portal APIs

Firm Data

Queue

Policy

Policy Trar

Advisor Tra

Beneficiary

Policy Issu

Beneficiary

Policy Eve

Insured Retirement Institute

Select A Policy Owner

Michael Johnson
mjohnson@example.com
555-987-6543

Laura Williams
lwilliams@example.com
555-123-9876

TanStack Router

Notification `2025-02-12T19:53:27Z`

[Base URL: 0mvz5u2gxl.execute-api.us-east-1.amazonaws.com/Dev]

/notification-swagger-api.json

Schemes

HTTPS ⌄

default

POST	/notfication

OPTIONS	/notfication

Models

Empty Schema ›

Insured Retirement Institute

Update Allocations

Beneficiary	Add Per Stirpes	Percentage	
Amy Johnson	⬤━	100	%
Carter Johnson	⬤━	50	%
Emma Johnson	⬤━	50	%

TanStack Router

Insured Retirement Institute

Update Allocations

Beneficiary	Add Per Stirpes	Percentage	
Amy Johnson	⬜	100	%
Carter Johnson	⬜	50	%
Emma Johnson	⬜	50	%

TanStack Router

Insured Retirement Institute

Update Allocations

Beneficiary	Add Per Stirpes	Percentage	
Amy Johnson	⬤	100	%
Carter Johnson	⬤	50	%
Emma Johnson	⬤	50	%

TanStack Router

Beneficiaries

Policy: POL987654321

Name	Per Stirpes?	Alloc
Amy Johnson	Yes	100%
Carter Johnson	Yes	50%
Emma Johnson	Yes	50%

Insured Retirement Institute

TanStack Router

What are you looking to do?

Choose one to view and edit

😋 **Beneficiary Information**	ⓘ **Annuity Information**
💲 **Withdrawals** Required Minimum Distribution	👤 **Contact Information**

TanStack Router

https://main.ddz5uyx8mx902.amplifyapp.com/1/edit-policies/edit-beneficiaries

Insured Retirement Institute

Select A Policy Owner

Michael Johnson
mjohnson@example.com
555-987-6543

Laura Williams
lwilliams@example.com
555-123-9876

TanStack Router

Insured Retirement Institute

Owner Information

	Portfolio Value	Name	Contact	Address
💰	**$500,000.5**	Michael Johnson	555-987-6543	456 Elm St

Projected Income

Legend: ● Annuities ● SocialSecurity ● Other
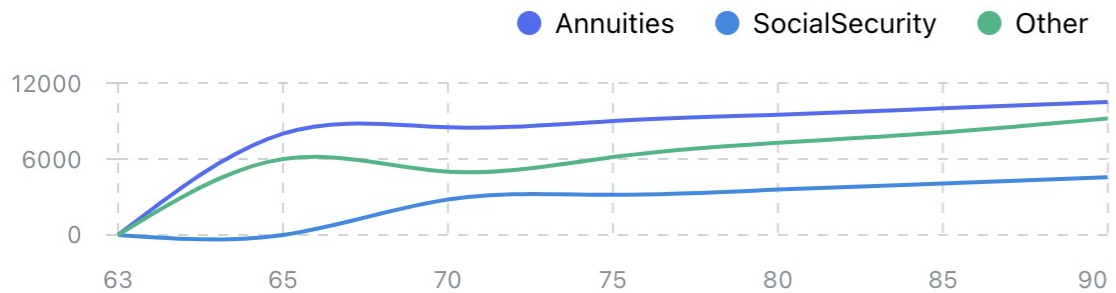
Policies

Policy Number	Carrier	Firm
POL987654321	Nationwide	Fidelity

TanStack Router

From: Begley, Kevin N <Kevin.Begley@FMR.com>
Date: Thursday, February 13, 2025 at 8:41 AM
To: Ayesha Vaphides <avaphides@lumafintech.com>, Begley, Kevin N <Kevin.Begley@FMR.com>, Booth, JoAnn <JoAnn.Booth@FMR.COM>, Chaganti, Rajasekhar <Rajasekhar.Chaganti@fmr.com>, Dhanasekaran, Obuli Sankar <obuli.sankar.dhanasekaran@fmr.com>, Hannah Pikus (hpikus@irionline.org) <hpikus@irionline.org>, Jacob Huiet <jhuiet@lumafintech.com>, Jon W. Volpe

(JVolpe@dtcc.com) <JVolpe@dtcc.com>, mpaul02@newyorklife.com <mpaul02@newyorklife.com>, Naramreddy, Pramod <Pramod.Naramreddy@fmr.com>, Samual Sines <ssines@lumafintech.com>, Samuvel_Gnanaolivu@nylim. com (Samuvel_Gnanaolivu@nylim.com) <Samuvel_Gnanaolivu@nylim.com>, Scott Bair <sbair@lumafintech.com>
Subject: Business Case - The Big Bene Theory 2.12.25.pptx

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