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Life Sales Central

New Case

Case List

Quick Quote

Search

Recent Activity

Petersen, Ray	Ultra Plus $800K	**12/31/14**	Edit
Nelson, Rich	True Term $400K	**12/21/14**	Edit
Petersen, Tracy	Ultra Plus $350K	**12/1/14**	Edit
Smith, Devin	Ultra Plus $120K	**11/29/14**	Edit
Petersen, John	Ultra Plus $140K	**11/28/14**	Edit

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Life Sales Central

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Last updated: --

Phone Number
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Email
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Edit

Notes | Duplicate | Organize | Delete

Primary Insured

Product

Premium and Death Benefit

Riders and Benefits

Additional Insured

Variations and Distributions

Interest Rates

Ledger

Report Options

Generate Illustrations

Case Type

? What's a case?

New Business

Term Conversion & Exchange

Reprojection

Templates

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Month ▾ | Day ▾ | Year ▾

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Notes   Duplicate   Organize   Delete

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Generate Illustrations

What's a case?

A case is all of the information about a person and product that is needed to generate on illustration. You can create multiple cases each with different products, product attributes, people, roles, riders, etc.
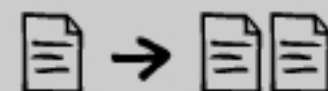
Duplicating cases

Once you've created a case, you can easily duplicate it into a new case. This saves you from re-entering customer information and makes it easy to change the info on the new case.

Linking cases

If you've created multiple cases for the same person, family, or group of people, you can link them together for easy updating and comparison. You can learn more about linking on the case home screen.

Next

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Primary Insured >

Product & Underwriting

Death Benefit and Premium

Riders and Benefits

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Report Options

Generate Illustration

Primary Insured

🔍 Search for person

First Name

Last Name

Gender

| Male | Female |

Date of Birth

Month ▼ Day ▼ Year ▼

Age

ⓘ **Primary Insured**

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Learn more

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Life Sales Central

Petersen, Ray
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Last updated: 12/31/14

Phone Number	Edit
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Email	
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Notes   **Duplicate**   **Organize**   **Delete**

Primary Insured >	
Product & Underwriting	
Death Benefit and Premium	
Riders and Benefits	
Additional Insured	
Distributions	
Interest Rates	
Ledger	
Report Options	
Generate Illustration	

Primary Insured

🔍 Search for person

First Name
Ray

Last Name
Petersen

Gender
Male   Female

Date of Birth
January ▼   7 ▼   1962 ▼

Age
52

ⓘ **Primary Insured**

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Learn more

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Life Sales Central

Petersen, Ray
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Last updated: 12/31/14

Phone Number   Edit
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Email
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✏️ Notes   📄 Duplicate   📁 Organize   🗑️ Delete

Primary Insured

Product & Underwriting ❯

Death Benefit and Premium

Riders and Benefits

Additional Insured

Distributions

Interest Rates

Ledger

Report Options

Generate Illustration

Product

State
Select ▼

Product
Select ▼

Rate Class
Select ▼
Rate Class Estimator

Table Rating
Select ▼

Flat Extra / $1000

ⓘ **Product**

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Learn more

Auto-saved: 1 sec. ago...   **Next**

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Life Sales Central

Petersen, Ray
Ultra Plus
--
Last updated: 12/31/14

Phone Number   Edit
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Email
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Notes   **Duplicate**   **Organize**   **Delete**

Primary Insured

Product & Underwriting >

Death Benefit and Premium

Riders and Benefits

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Distributions

Interest Rates

Ledger

Report Options

Generate Illustration

Product

State
Illinois ▼

Product
Ultra Plus ▼

Rate Class
Preferred Elite ▼
Rate Class Estimator

Table Rating
- ▼

Flat Extra / $1000
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ⓘ **Product**

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Learn more

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Life Sales Central

Active Case List

🔍 Search

Active (13)	Archive (22)

Name	Product	Last Updated ▼			
Petersen, Ray 847-319-4722 j.petersen@gmail.com ➕ New Case	Ultra Plus $800K (Preferred Elite, Female, age 36) $32.19/mon	12/31/14	📄	🗂	🗑
Nicholson, Rich 847-323-5065 rich.nicholson@gmail.c ➕ New Case	Ultra Plus $800K (Preferred Elite, Male, age 52) $32.19/mon	12/29/14	📄	🗂	🗑
	True Term $600K (Preferred, Male, age 52) $32.51/mon	12/29/14	📄	🗂	🗑
Nicholson, Tracy 847-323-5077 t.nicholson@gmail.com ➕ New Case	True Term $300K (Preferred Elite, Female, age 51) $22.46/mon	12/29/14	📄	🗂	🗑
Smith, Devin 847-312-3215 devin.smith@gmail.com ➕ New Case	Ultra Plus $500K (Preferred Elite, Female, age 31) $26.44/mon	12/19/14	📄	🗂	🗑
	True Term $600K (Preferred, Female, age 31) $32.51/mon	12/19/14	📄	🗂	🗑
Jones, Tim 847-319-4722	Ultra Plus $800K (Preferred Elite, Man, age 36) $32.19/mon	12/2/14	📄	🗂	🗑

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Life Sales Central ⚙

--   Phone Number   Edit
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Last updated: --   --

✏ Notes   🗐 Duplicate   🗀 Organize   🗑 Delete

Primary Insured

Product

Premium and Death Benefit

Riders and Benefits

Additional Insured

Variations and Distributions

Interest Rates

Ledger

Report Options

Generate Illustrations

Search for Person ⊗

Individual Name ▾

First Name

[   ]

Last Name

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State

Select ▾

Optional

Address

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Zip

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🔍 Search

Next

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Life Sales Central

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Notes   Duplicate   Organize   Delete

Primary Insured

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Generate Illustrations

Search for Person

Individual Name ▼

First Name
Ray

Last Name
Peterson

State
Illinois ▼

Optional

Address

Zip

🔍 **Search**

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Edit

Notes   Duplicate   Organize   Delete

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Search Results (16)

Back to Search

Peterson, Ray
Customer
123 Main St. Northbrook, IL 60062
08/13/1965

Peterson, Raymon W
Former Customer
428 17th St, Wheaton, IL 60062
01/28/1957

Peterson, Raymond W
Customer
12214 County Rd. Morris, IL 60450
09/12/1960

Peterson, Michael W
Customer
212 Oak St. Chicago, IL 60622
10/24/74

Peterson, Michael W

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