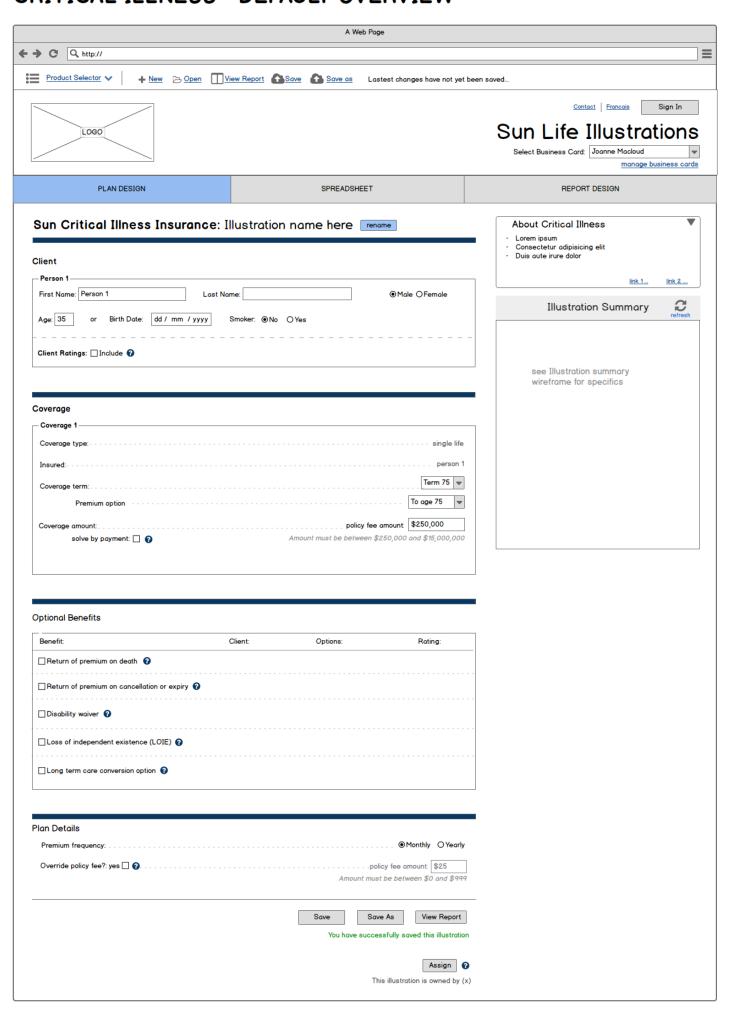
Critical Illness, 'Term Enhancement' and General Wireframe Package

Final Draft - April 29, 2015

CRITICAL ILLNESS - DEFAULT OVERVIEW



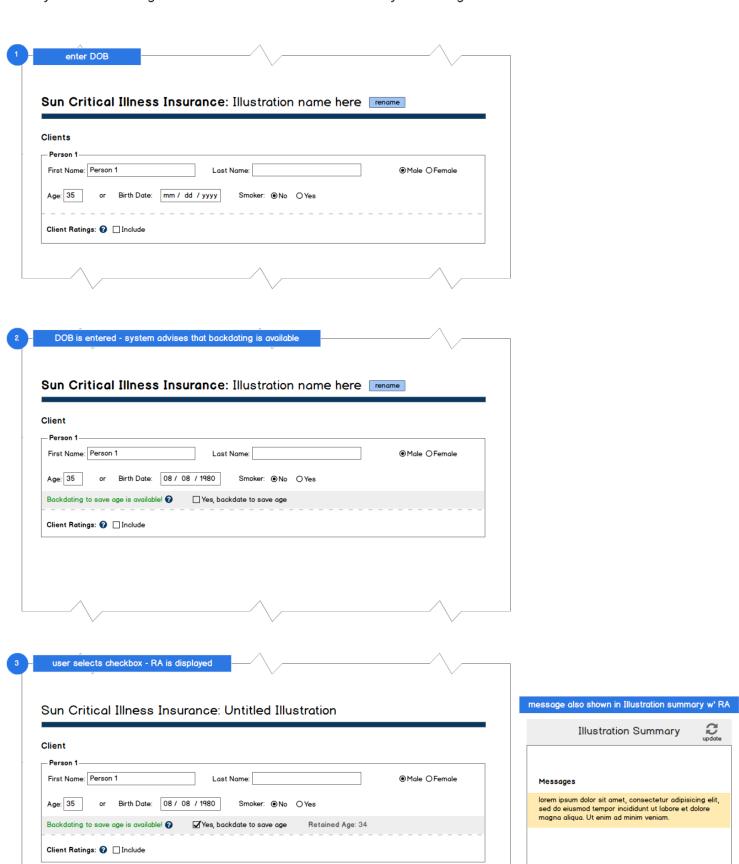
CRITICAL ILLNESS - CLIENT RATINGS

Clients

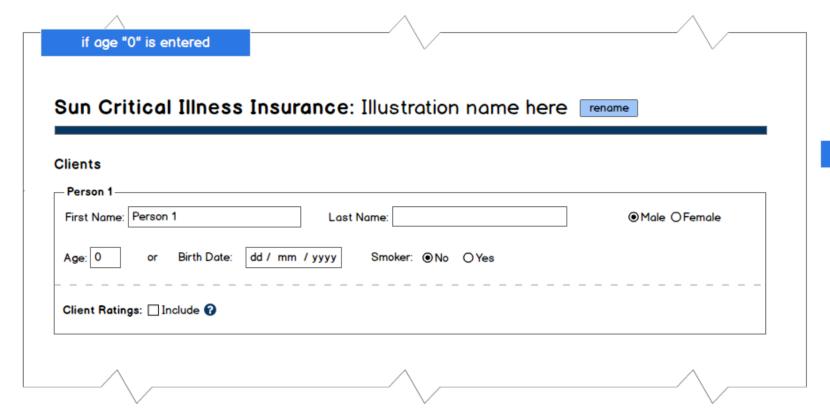
Person 1———		
First Name: Perso	on 1 Last Name:	Male ○Female
Age: 35 or	Birth Date: dd / mm / yyyy Smoker: No ○Yes	
Client Ratings: In	clude 🗹 🔞	
Morbidity Assessment:	tandard 🔻	
Morbidity st		

CRITICAL ILLNESS - BACKDATE TO SAVE AGE

Only show backdating if DOB is entered and IS available. Rely on training the user.



CRITICAL ILLNESS - MINIMUM AGE (30 days)



message/notification shown in Illustration summary

Illustration Summary Messages lorem ipsum dolor sit amet, consectetur adipisicing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam.

CRITICAL ILLNESS - OPTIONAL BENEFITS

Optional Benefits - Initial default state

Benefit:	Client:	Options:	Rating:
☐ Return of premium on death ?			
Return of premium on cancellation or expiry ?			
☐ Disability waiver			
□Loss of independent existence (LOIE) ②			
☐ Long term care conversion option			

Optional Benefits - Example of selected state (only one item selected)



Optional Benefits - Example of all optional benefits selected

any amounts/info associated with benefit is displayed in Illustration Summary



When only one option in the drop down - exact styling TBD in visual design stage



CRITICAL ILLNESS - REPORT DESIGN

	A Web Page	
← → C Q http://		=
Product Selector V + New > Open \(\text{Dpen} \)	iew Report <u>Save</u> <u>Save as</u> Lastest changes have not yet b	een saved
LOGO		Contact Francois Sign In Sun Life Illustrations Select Business Card: Joanne Macloud manage business cards
PLAN DESIGN	SPREADSHEET	REPORT DESIGN
Sun Critical Illness Insurance: Il Designed for: if entered this appears on cover page	lustration name here rename	Report Language: ⊚English ○French
Client Report Options	□ select all	Advisor Report Options
		Underwriting requirements
☐ Cover Page	☑Policy Values	☐ Commission Summary
☐ Business Card Information	☐ Premium Information	1st yr Overide: 100%
☐ Table of Contents	OPremium Summary OPremium Details	
☐ Benefits of Sun CII	☑Important Illustration Notes	View Advisor Report
☑Client Summary	☐Underwriting Requirements	
☑Plan Description		Other Information
		☐ This is a link to a pdf
View Client Report		This is another link to a pdf
		This is a web link
premium information is selected, 'premium d	etails' is selected by default	

premium information is selected, 'premium details' is selected by default

Premium Information

OPremium Summary

OPremium Details

CRITICAL ILLNESS - ILLUSTRATION SUMMARY

Adult

Illustration Summary update \$2,300.45/year Premium: if premium frequency was set to monthly: \$123.45 Plan Summary Term 10, to age 75 Coverage \$500,000 Male, 35, non-smoker, Rated Person 1 **Optional Benefits** Return of premium on death \$44.49 Return of premium on cancellation/expiry \$25.34 15 year Disability waiver \$25.34 standard Loss of independent existence (LOIE) \$25.34 Long term care conversion option \$15.85 Conversion amount \$250,000 LTCI Weekly Benefit \$1250 Quick Compare **②** show

Juvenile

Illustration Sum	nmary Qupdo	il //
Premium: \$2	2,300.45/ye	ar
if premium frequency was set to month	thly: \$123.	45
Plan Summary		
Coverage	Term 10, to age 75	
Person 1	Male, 16, non-smoke	er
Optional Benefits		
Return of premium on death	\$44.4	
Return of premium on cancellation/e to age 35	expiry co \$25.3	
		-
Loss of independent existence (LOI included in all juvenile plans		st 80
		-
Quick Compare 😯	sho	ow

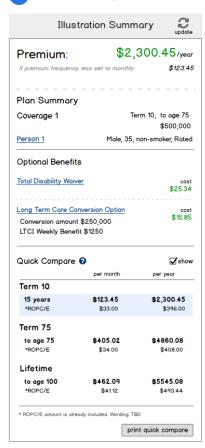
CRITICAL ILLNESS - QUICK COMPARE (Illustration Summary)

All examples include ROPC/E

*** ROPC/E is only shown if it is selected as an optional benefit

Non-quick pay (Life pay)

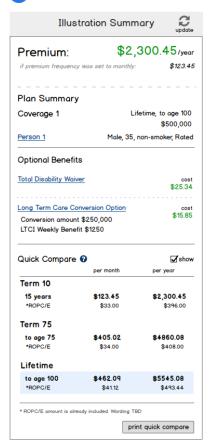




2 Term 75, to age 75

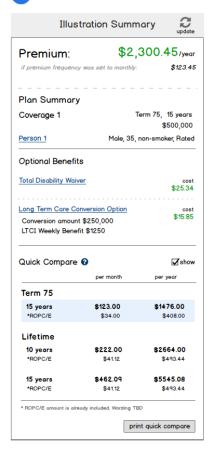
Premium:	\$2,	300.45/ye
if premium frequency	was set to monthly:	\$123.4
Plan Summary		
Coverage 1	Te	erm 75, to age 75
		\$500,00
Person 1	Male, 35,	non-smoker, Rate
Optional Benefits	s	
Total Disability Waive	<u>er</u>	\$25.3
Long Term Care Cor	nyoreion Ontion	cos
Conversion amount LTCI Weekly Benefi	\$250,000	\$15.8
Conversion amount	\$250,000 it \$1250	\$15.8 ☑ sho
Conversion amount LTCI Weekly Benefi Quick Compare	\$250,000 it \$1250	\$15.8
Conversion amount LTCI Weekly Benefi Quick Compare	\$250,000 it \$1250	\$15.8 ☑sho
Conversion amount LTCI Weekly Benefi Quick Compare	\$250,000 it \$1250	\$15.8 ☑ sho
Conversion amount LTCI Weekly Benefi Quick Compare Term 10 15 years	\$250,000 it \$1250	\$15.8 ✓ sho per year \$2,300.45
Conversion amount LTCI Weekly Benefi Quick Compare Term 10 15 years *ROPC/E	\$250,000 it \$1250	\$15.8 ✓ sho per year \$2,300.45
Conversion amount LTCI Weekly Benefi Quick Compare Term 10 15 years *ROPC/E Term 75	\$250,000 it \$1250 Per month \$123,45 \$33.00	\$15.8 shoper year \$2,300.45 \$396.00
Conversion amount LTCI Weekly Benefi Quick Compare Term 10 15 years *ROPC/E Term 75 to age 75	\$250,000 it \$1250 per month \$123.45 \$33.00	\$15.8 ✓ sho per year \$2,300.45 \$396.00
Conversion amount LTCI Weekly Benefi Quick Compare Term 10 15 years *ROPC/E Term 75 to age 75 *ROPC/E Lifetime to age 100	\$250,000 it \$1250 Per month \$123.45 \$33.00 \$405.02 \$34.00	\$15.8 If sho per year \$2,300.45 \$396.00 \$4860.08 \$408.00
Conversion amount LTCI Weekly Benefit Quick Compare Term 10 15 years *ROPC/E Term 75 to age 75 *ROPC/E Lifetime	\$250,000 it \$1250 Per month \$123.45 \$33.00 \$405.02 \$34.00	\$15.8 \$15.8 \$2,300.45 \$396.00 \$4860.08 \$408.00
Conversion amount LTCI Weekly Benefi Quick Compare Term 10 15 years *ROPC/E Term 75 to age 75 *ROPC/E Lifetime to age 100	\$250,000 it \$1250 per month \$123.45 \$33.00 \$405.02 \$34.00 \$462.09 \$41.12	\$15.8 If shoper year \$2,300.45 \$396.00 \$4860.08 \$408.00 \$5545.08 \$493.44

Lifetime, to age 100

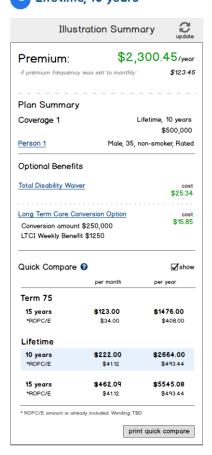


Quick pay

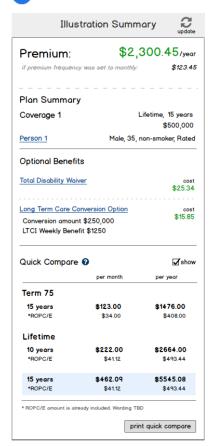








Lifetime, 15 years



Term Specific Wireframe Quick Compare

TERM - QUICK COMPARE (Illustration Summary)

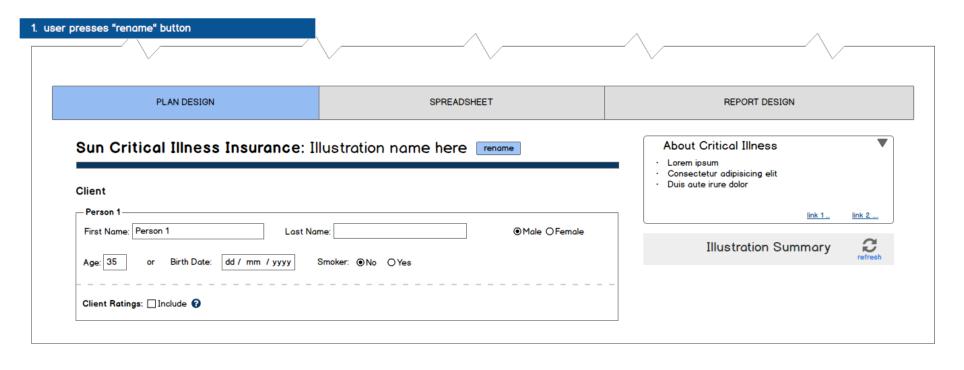
/\		
\vee		\vee
Quick Compar	e 0	✓show
	per month	per year
Term 10	\$123.45	\$2,300.45
Term 15	\$405.02	\$4860.08
Term 20	\$462.09	\$5545.08
Term 30	\$496.54	\$5958.48
	pri	nt quick compare
	pii	in quion compare

General Wireframes

(apply to more than one product)

Rename Illustration Loading report

GENERAL - RENAME ILLUSTRATION (default)



2a. Ilustration name becomes editable (input text box), "rename" button now functions as "save".

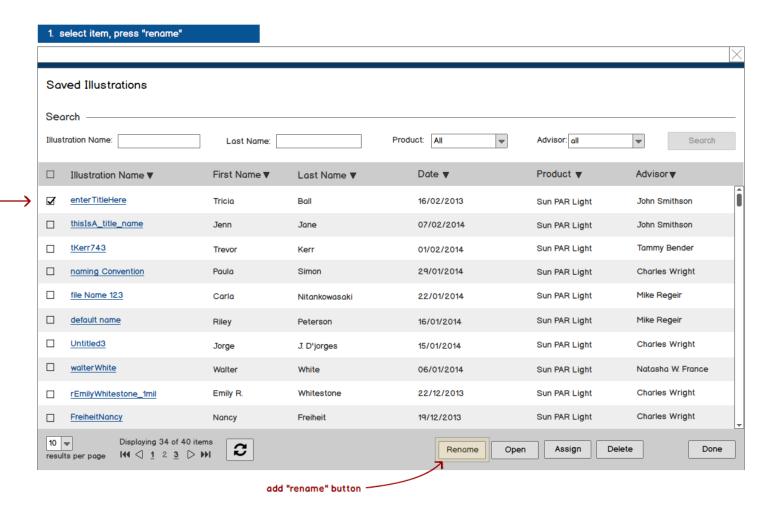
PLAN DESIGN		SPREADSHEET	REPORT DESIGN
Sun Critical Illness In	SURANCE: Illustration name	here x save	About Critical Illness • Lorem ipsum

OR

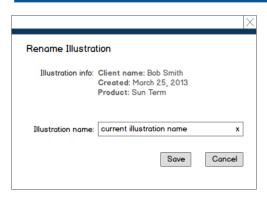
2b. Use dialogue box that we are using in the Open Illustrations screen.



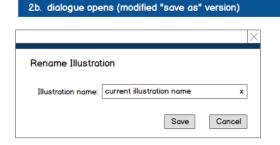
GENERAL - RENAME ILLUSTRATION (open illustrations)



2a. dialogue opens with current illustration info (same as "save as" dialogue), including current name of file



OR ----



GENERAL - "LOADING" VIEW REPORT

