INSURANCE TECHNOLOGIES

Product Repository 2.19 December

FIRELIGHT BASE

FireLight®

Platform

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Design Approach - Product Repository 2.19 December

Enhancements will be made to the data stored in the product repository to support rates that vary by rider and guarantee periods within the same CUSIP. We currently have the support for these items to be entered on our rate spreadsheet, but the products are not built out to support multiple listings for the rider and guarantee period rate variance. The upload process will also be enhanced to allow PPfAs with multiple ownership nodes to be uploaded. Currently, PPfAs with more than one ownership node will not load into the product repository.

Impacts:

• Product Repository-support upload of PPfAs with multiple entity nodes on ownership.

• Fixed and MYGA products that have rates that vary by rider will be stored as separate product details in the database.

• Fixed and MYGA products that have rates that vary guaranteed interest rates will be stored as separate product details in the database.

1   PPfA Upload Enhancements

Enhancements made to the upload process for the PPfA to upload successfully when there is more than one organization listed in the ownership node.

1.1   Support more than one organization type on ownership

When a PPfA is uploaded with more than one EntityType in the ownership node (within the same QualifiedPlanEntity), the upload fails. While this may be a rare setup, this is how some of the PPfAs are setup, so we need to solve to support the upload process where there is more than one EntityType in the ownership node. Sometimes non-natural, non-qualified entities come over in the seed data with the OrgForm as "Other". This setup is to accommodate an account at the distributor that is set up as an LLC or Partnership, but not a true Corporation. We will allow the upload to process by ignoring the 2nd record labeled "Other" with a PartyTypeCode of 2.

Acceptance Criteria

- PPfA with more than one organization listed in the ownership node loads successfully.

2 Product Repository-Data Support Enhancements

Enhancing the way data is stored in the product repository to allow data to be stored and retrieved as separate product entries when rates vary by rider and guaranteed years within the same CUSIP ID.

2.1   Rate Support for Rider Variation

Products can have rates that vary by Rider. When a Rider Name and Rider Product Code are entered on the rate spreadsheet template, the system will treat that as another version of the product. Data will be parsed and stored in the Product Repository in such a way that it can be separated for display as multiple product versions.

Acceptance Criteria

- Data is parsed from the rate spreadsheet and stored in the product repository to allow retrieval of data for riders by varying rates.

2.2   Rate Support for Interest Guaranteed Years

When a product has multiple interest guaranteed years within the same product CUSIP, the current rate setup does not support displaying these variances as multiple products. Data will be parsed and stored in the Product Repository in such a way that it can be separated for display as multiple product versions. The product will be displayed as a separate variation of the product when the Interest Guaranteed Years are entered on the rate spreadsheet.

Acceptance Criteria

- Data is parsed from the rate spreadsheet and stored in the product repository to support multiple product listings when the same product CUSIP has varying Interest Guaranteed Years for Fixed products.
- Data is parsed from the rate spreadsheet and stored in the product repository to support multiple product listings when the same product CUSIP has varying Interest Guaranteed Years for MYGA products.