

Conceptulization of Wireframes for Metlife Sales Application

User Group : Sales Associate Version : 1.0




Date : 2/8/2015 Platform - Tablet

Author - Roopesh Donde, UX Designer

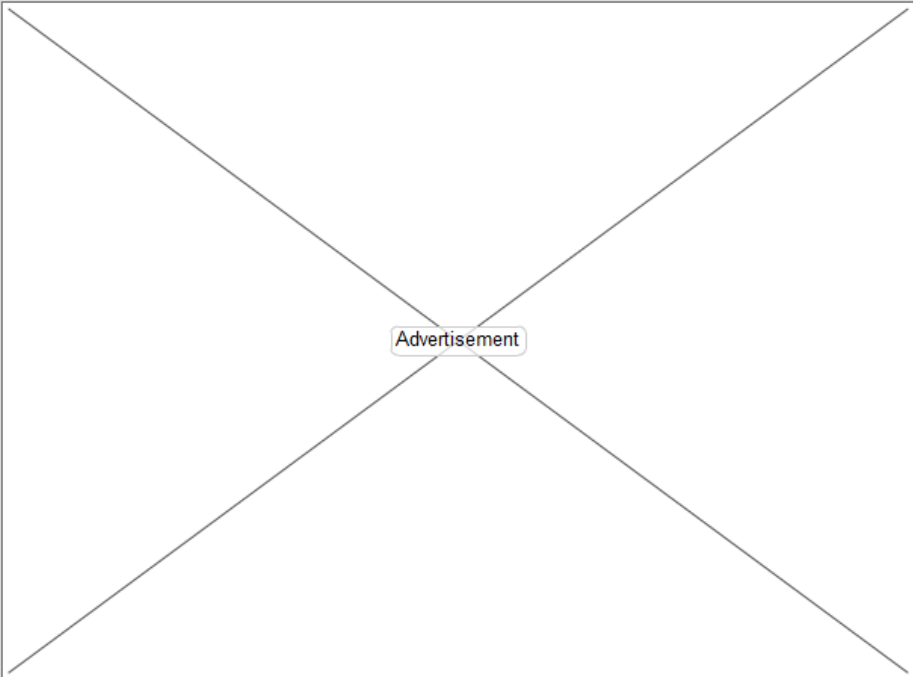


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1. Login

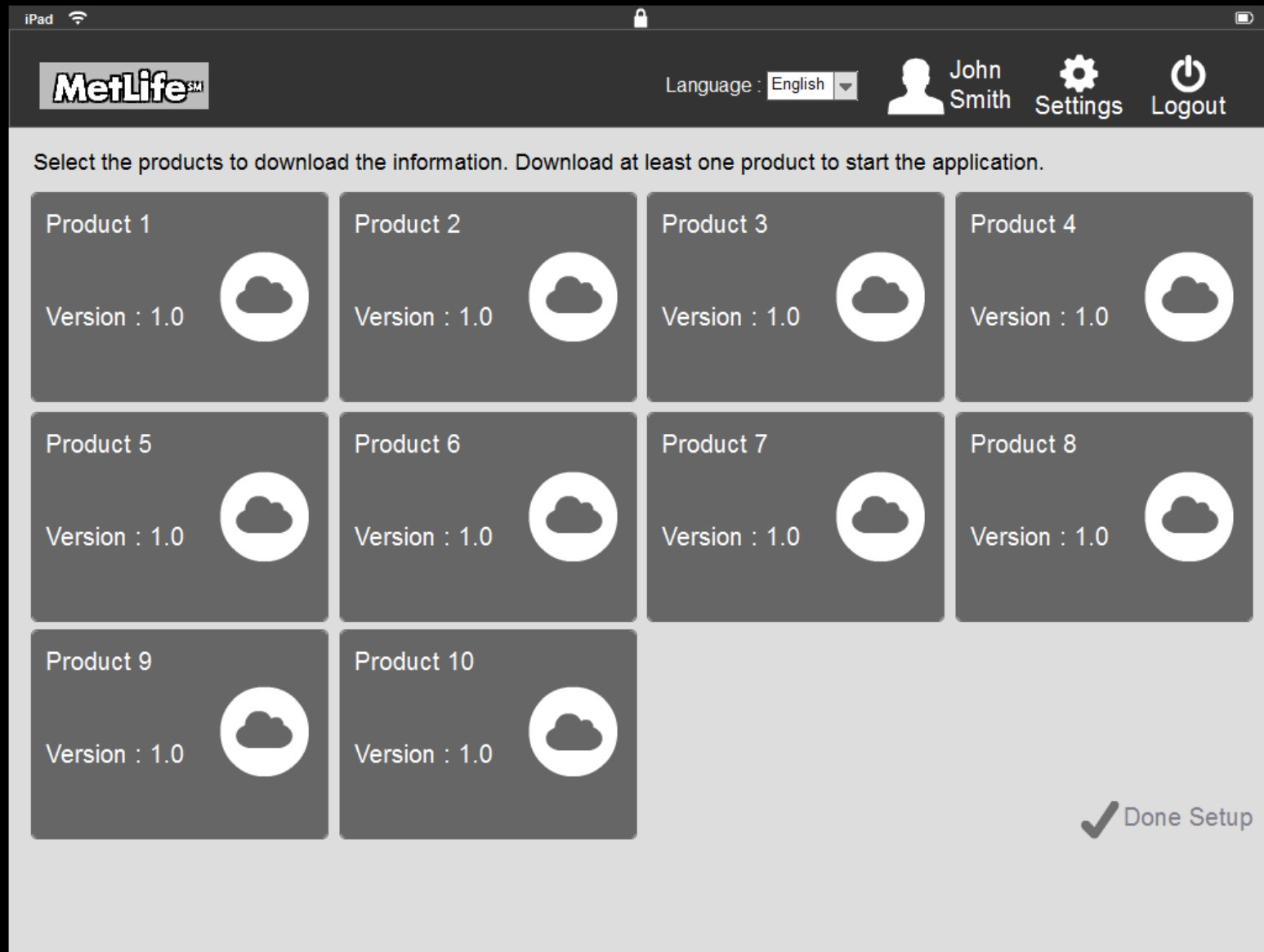
iPad   

MetLifeSM Language : English ▾

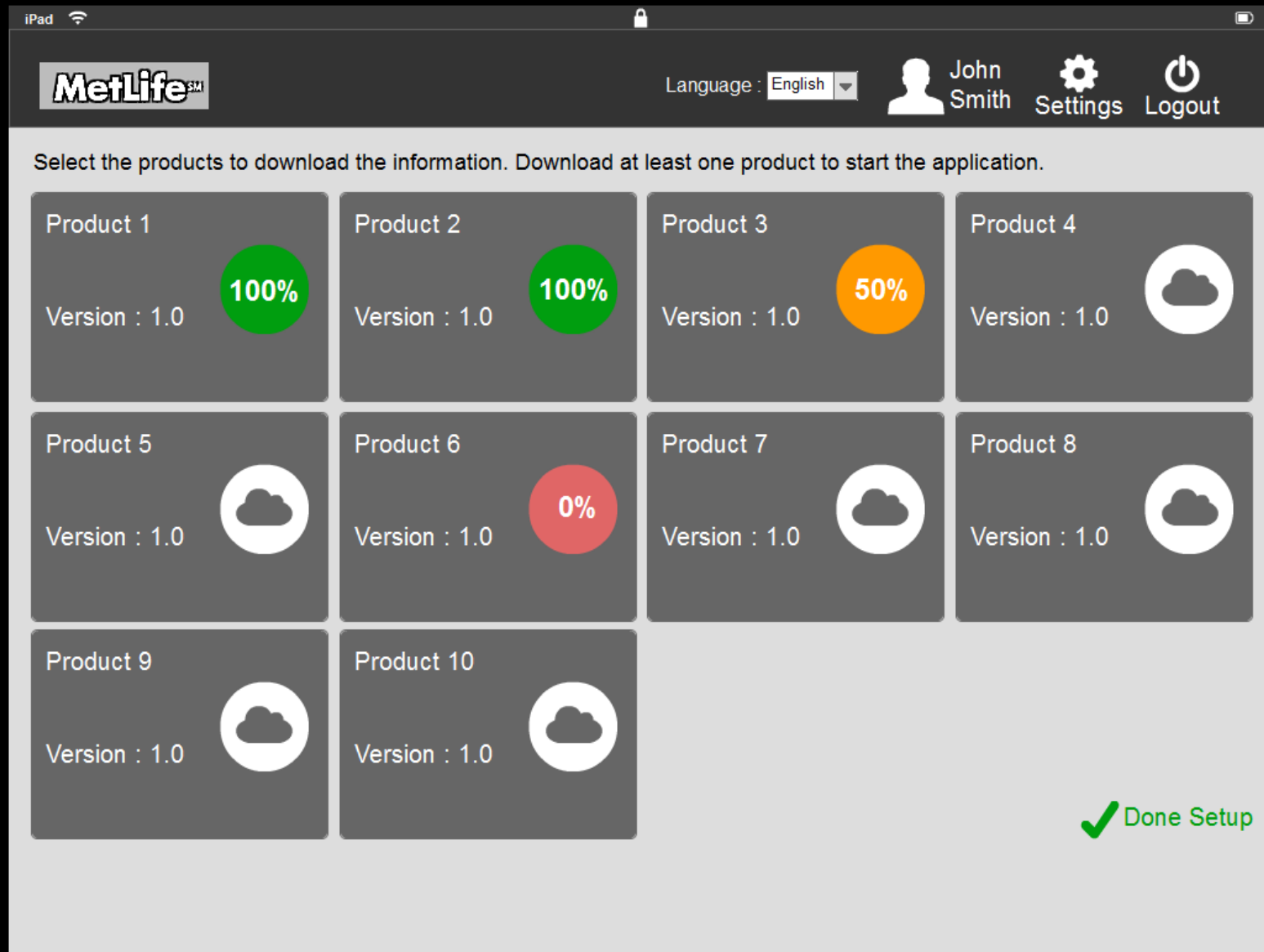


Advertisement

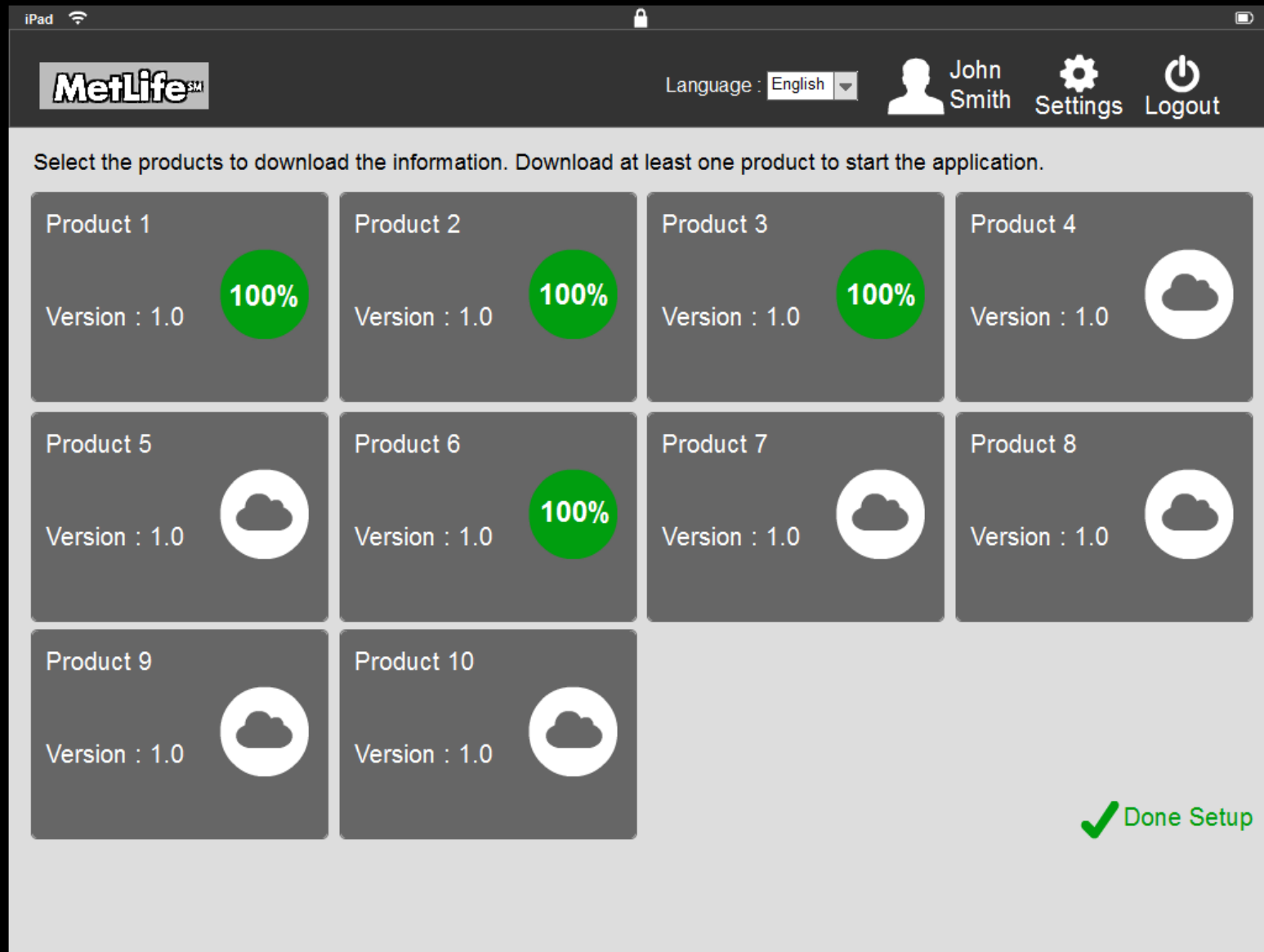
3. Product download - First Login



3. Product download - Select Products



3. Product download - Done Setup



2. Homepage

MetLifeSM

Language : English

John Smith

Settings

Logout

Recent Customers

Mr. R. Smith

Mrs. J. Smith

Mr. X. Smith

Profile 1

ILL1

Plan Name : Product 1
Sum Assured : RM 30000
Created on Jan 16,2015

ILL2

Plan Name : Product 1
Sum Assured : RM 30000
Created on Jan 16,2015

Profile 2

ILL1

Plan Name : Product 1
Sum Assured : RM 30000
Created on Jan 16,2015

ILL2

ILL3

Customer Search

Gender : Male Female

Date of Birth :

ANB:

Smi

Mr. R. Smith

Mrs. J. Smith

Mr. X. Smith

My Content

Products

Brochures

Promotional

Client Data Management

Customer Fact Find

Financial Need Analysis

Sales Illustration

Reference

Home

Feb 2008

S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28		

7th Feb, 2008

2. Homepage


MetLifeSM


Language : English


John Smith

Settings


Logout


Products


References

Promotional

Customer Search


Mr. R. Smith, 9999912345, r.smith@abc.com


Mrs. J. Smith, 9999922345, J.smith@abc.com


Mr. X. Smith, 9999932345, X.smith@abc.c


[Advanced Search](#)


Recent Customers




Mr. R. Smith


Mrs. J. Smith


Mr. X. Smith


Mr. Y. Smith


Mr. Z. Smith


 Profile 1	Plan Name : Product 1 Sum Assured : RM 30000 Created on Jan 16,2015	Plan Name : Product 1 Sum Assured : RM 30000 Created on Jan 16,2015	Plan Name : Product 1 Sum Assured : RM 30000 Created on Jan 16,2015
 Profile 2	Plan Name : Product 1 Sum Assured : RM 30000 Created on Jan 16,2015	Plan Name : NA Sum Assured : NA Created on Jan 16,2015	
 Profile 3	Plan Name : NA Sum Assured : NA Created on Jan 16,2015		


Client Data Management

Customer Fact Find

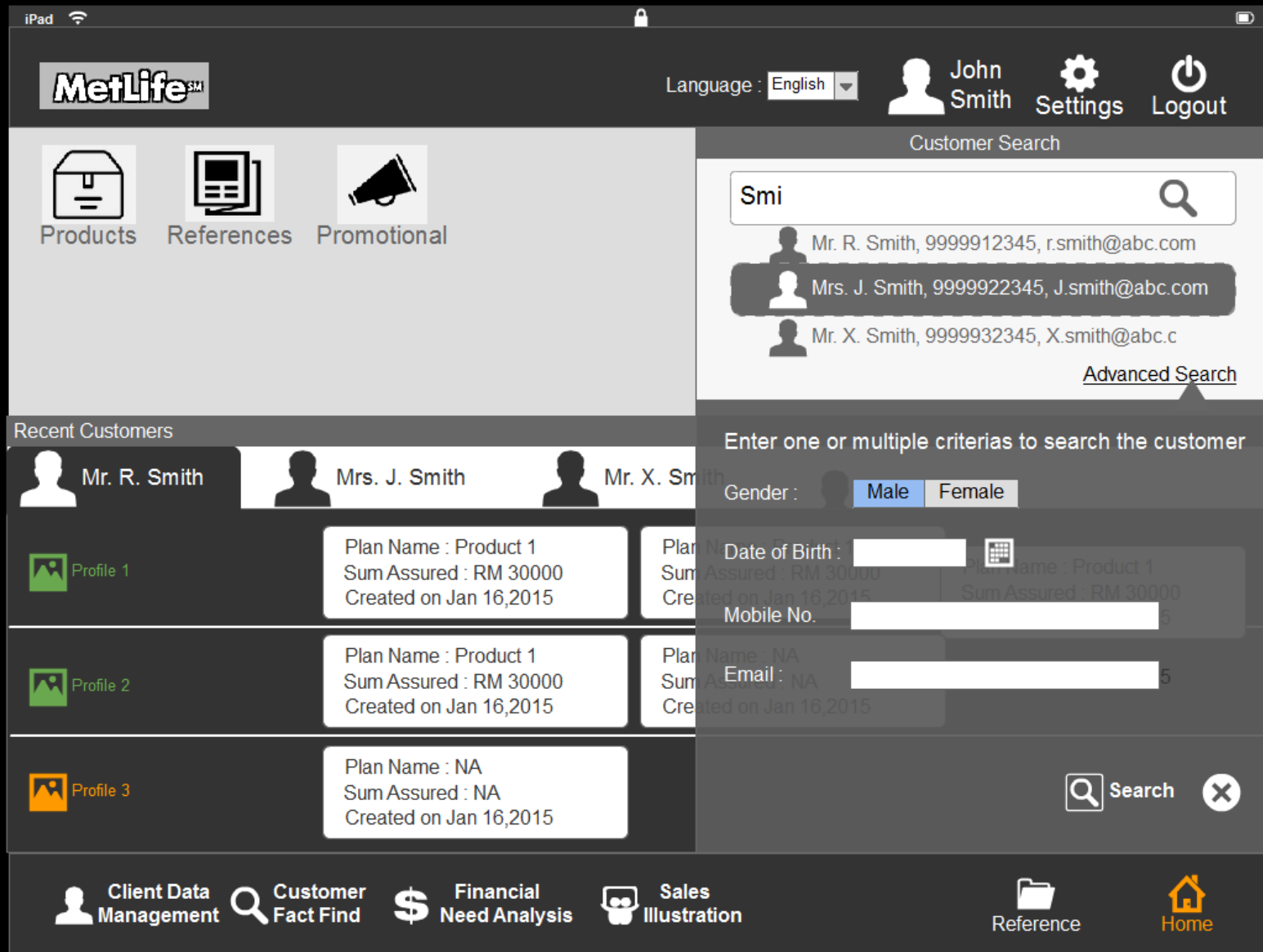
Financial Need Analysis

Sales Illustration

Reference

Home

2. Homepage



2. Homepage - Settings


iPad


MetLifeSM

Language :

English

John Smith

 Settings

 Logout

Agent's Code

AG1002001

Agent's Name


Vald Vaynrokh

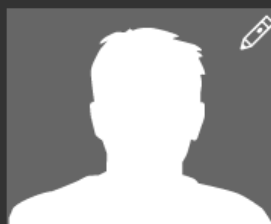
Email


waynrokh@metlife.com


Contact No.


012345678








 ³ Product Downloads


 Client Data Management

 Customer Fact Find

 Financial Need Analysis

 Sales Illustration

 Reference

 Home

3. Product Downloads

iPad

MetLifeSM

Language : English

John Smith

Settings

Logout

Product Downloads

Product 1 *Update required*
Version : 2.0

Product 2
Version : 1.0

Product 3
Version : 1.0

Product 4
Version : 1.0

Product 5
Version : 1.0

Product 6
Version : 1.0

Product 7
Version : 1.0

Product 8
Version : 1.0

Product 9
Version : 1.0

Product 10
Version : 1.0

Product 11 *new*
Version : 1.0

Product 12 *new*
Version : 1.0

Client Data Management

Customer Fact Find

Financial Need Analysis

Sales Illustration

Reference

Home

2. Homepage - Client Data

MetLifeSM

Language : English

John Smith

Settings

Logout

Products

References

Promotional

Customer Search

Mr. R. Smith, 9999912345, r.smith@abc.com

Mrs. J. Smith, 9999922345, J.smith@abc.com

Mr. X. Smith, 9999932345, X.smith@abc.c

[Advanced Search](#)

Recent Customers

Mr. R. Smith

Mrs. J. Smith

Mr. X. Smith

Mr. Y. Smith

Mr. Z. Smith

Profile 1	Plan Name : Product 1 Sum Assured : RM 30000 Created on Jan 16,2015	Plan Name : Product 1 Sum Assured : RM 30000 Created on Jan 16,2015	Plan Name : Product 1 Sum Assured : RM 30000 Created on Jan 16,2015
Profile 2	Plan Name : Product 1 Sum Assured : RM 30000 Created on Jan 16,2015	Plan Name : NA Sum Assured : NA Created on Jan 16,2015	
Profile 3	Plan Name : NA Sum Assured : NA Created on Jan 16,2015		

Client Data Management

Create Customer

Customer History

4. Client Data - Create New

Salutation
selection scroll

BRJ, JEN

DATIN
DATIN, SERI
DATO
DATO, DR
DATO, SRI
DATUK
DATUK, DR
DATUK, SERI

NRIC

Police ID
Birth Certificate
Passport
Others

€

\$

£

Language : English

John Smith

Settings

Logout

1 Create Customer and Profile

2 Customer Fact Find

3 Financial Need Analysis

4 Sales Illustration

Enter the customer details

CIK

Customer Name

Military ID

ID Number

ANB

Occupation

Occupation Category

Occupation Class

Email

ID Number

Estimated Annual Income

\$ 725000

Click customer picture

Gender

☒ Male ☐ Female

Date Of Birth

Marital Status

Contact

Mobile

Alternative Contact

Mobile

Smoking Habit

☒ YES ☐

Customer Fact Find

Client Data Management

Create Customer

Customer History

Married

Widowed
Divorce/Seperated

4. Client Data - Create New Photo taken

iPad

MetLifeSM

Language : English

John Smith

Settings

Logout

1 Create Customer and Profile 2 Customer Fact Find 3 Financial Need Analysis 4 Sales Illustration

Enter the customer details

CIK Customer Name

Military ID ID Number

ANB

Occupation

Occupation Category

Occupation Class

Email ID Number

Estimated Annual Income \$ 725000

Gender Male Female

Date Of Birth Jun 25, 1987

Marital Status Single

Contact

Mobile

Alternative Contact

Mobile

Smoking Habit YES

Save customer Record

Customer Fact Find ➔

Client Data Management

Create Customer

Customer History

🔍 \$ 🗨️ 📁 🏠

4. Client Data - Customer History

MetLifeSM

Language : English

John Smith

Settings

Logout

Recent Customers

Customer 1

Customer 2

Customer 3

Customer 4

Customer 5

Customer 6

Customer Search

Smi

Mr. R. Smith, 9999912345, r.smith@abc.com

Mrs. J. Smith, 9999922345, J.smith@abc.com

Mr. X. Smith, 9999932345, X.smith@abc.c



Mrs. J Smith

ID : E321234

Email : customer.1@abc.com

Phone : 9999922345

Date of Birth : Jun 25,1987

Profile 1

Profile updated on : Jan 16, 2015

Create New Profile

Plan Name : Product 1

Sum Assured : RM 30000

Created on Jan 16,2015

☒ Income Replacement Assessment

☒ Child Education Fund Assessment

Plan Name : Product 1

Sum Assured : RM 30000

Created on Jan 16,2015

☒ Income Replacement Assessment

☐ Child Education Fund Assessment

Plan Name : NA

Sum Assured : NA

Created on Jan 16,2015

☐ Income Replacement Assessment

☐ Child Education Fund Assessment

Client Data Management

Create Customer

Customer History

Search

Dollar

Headset

Folder

Home

5. Customer Fact Find - Customer Advice Choice and Declaration

MetLifeSM

Language : English

John Smith

Settings

Logout

1 Create Customer and Profile

2 Customer Fact Find

3 Financial Need Analysis

4 Sales Illustration

Customer Advice Choice and Declaration

Customer 1

CIK

Customer Name

Gender

Male

Female

Military ID

ID Number

Date Of Birth

ANB

Marital Status

Single

Occupation

Contact

Mobile

Occupation Category

Alternative Contact

Mobile

Occupation Class

Estimated Annual Income

\$

725000

Customer Advice Choice and Declaration

☒ I/We wish to disclose all information requested for in this form

☐ I/We wish to disclose partial information requested for in this form(Fill in all sections except family details section)

☐ I/We wish to recieve product information only and do not wish to disclose any information requested in this form. (fill in all sections except sections Financial Needs Analysis and Family Details)

Customer Details

Disclosure of Agent status

Customer Fact Find

\$

5. Customer Fact Find - Disclosure of Agent Status

MetLifeSM

Language : English

John Smith

Settings

Logout

Create Customer

Customer Fact Find

Financial Need Analysis

Sales Illustration

Disclosure of Agent Status

Customer 1

Agents Code

AG1002001

Agents Name

Vald Vaynrokh

I am a life insurance agent who represents AmMetLife Insurance Berhad(AmMetLife) and can advise you on our full range of:

☒ Term insurance products

☒ Endowment insurance products

☒ Whole life insurance products

☒ Medical, Accident and Health Insurance products

☐ Investment Linked Insurance Products

Save

Customer Advise Choice and Declaration

My Financial Needs

Customer Fact Find

\$

5. Customer Fact Find - Disclosure of Agent Status

MetLifeSM

Language : English

John Smith

Settings

Logout

Create Customer

Customer Fact Find

Financial Need Analysis

Sales Illustration

Disclosure of Agent Status

Customer 1

Agents Code

AG1002001

Agents Name

Vald Vaynrokh

☒ Whole life insurance products

☒ Medical, Accident and Health Insurance products

☐ Investment Linked Insurance Products

I receive remuneration from AmMetLife Insurance Berhad for providing advice on and selling of their insurance product(s).

IMPORTANT NOTICE TO CUSTOMER (Please read this carefully before proceeding with your Customer Fact Find Form CFFF)

- * Your agent must have sufficient information before making a suitable recommendation. The information that you provide will be the basis on which advice is given.
- * If you choose not to provide all the relevant information requested, your agent may not be able to provide you with suitable advice and as a result, you may risk making a financial commitment to a life insurance policy inappropriate to your needs.

Save

Customer Advise Choice and Declaration

My Financial Needs

Customer Fact Find

\$

iPad

MetLifeSM Language : English John Smith Settings Logout

Create Customer Customer Fact Find Financial Need Analysis Sales Illustration

My Financial Needs Customer 1

My Financial Needs	Already Planned	To Discuss	Priority	Remarks
Content	<input checked="" type="radio"/> YES	<input type="radio"/> NO	1	already planned
Content	<input type="radio"/> NO	<input type="radio"/> NO	5	select
Content	<input checked="" type="radio"/> YES	<input checked="" type="radio"/> YES	3	review in future

Indicate under remark column, area not to be discussed and why eg, " already planned" , "review in future" , " not important now" etc
Priority - 1=Low, 5=High

Save Disclosure of Agent's Status Risk Profiling

Customer Fact Find

\$

MetLife

Language : English | John Smith | Settings | Logout

Create Customer | Customer Fact Find | Financial Need Analysis | Sales Illustration

My Financial Needs

Customer 1

My Financial Needs	Already Planned	To Discuss	Priority	Remarks
Content	<input checked="" type="checkbox"/> YES	<input type="checkbox"/> NO	1	already planned
Content	<input type="checkbox"/> NO	<input type="checkbox"/> NO	5	select
Content	<input checked="" type="checkbox"/> YES	<input checked="" type="checkbox"/> YES	3	review in future

Indicate under remark column, area not to be discussed and why eg, " already planned", "review in future", " not important now" etc
Priority - 1=Low, 5=High

Save | Disclosure of Agent's Status | Risk Profiling

Customer Fact Find

The screenshot displays the MetLife Financial Planning app on an iPad. The top status bar shows 'iPad' and a Wi-Fi signal. The app's header includes the MetLife logo, a language dropdown set to 'English', and user information for 'John Smith' with icons for 'Settings' and 'Logout'. Below the header, a navigation bar contains four tabs: 'Create Customer' (green), 'Customer Fact Find' (blue, active), 'Financial Need Analysis' (white), and 'Sales Illustration' (white). The main content area is titled 'Risk Profiling' and shows 'Customer 1'. A 'Preference' section indicates 'Medium Appetite' and a 'Total Score' of 14. Two sections of questions are visible: 'I am prepared to invest for' and 'I can accept'. The first section has three options: 'Only a year or two' (score 1), 'Up to 5 years' (score 3), and 'More than 10 years' (score 5). The second section has three options: 'Very low risk and know that my capital is safe' (score 1), 'Some fluctuations in value' (score 3), and 'A higher risk for the chance of a higher return' (score 5). The bottom bar includes a 'Save' button, a 'Customer Fact Find' search icon, a progress bar with four colored segments (green, green, green, orange), and icons for '\$', a person, a folder, and a home button.

5. Customer Fact Find - Existing Policy Details 1

MetLifeSM

Language : English

John Smith

Settings

Logout

Create Customer

Customer Fact Find

Financial Need Analysis

Sales Illustration

Existing Policy Details

Customer 1

Policy 1

Policy 2

Policy 3

+

Number of Existing Policy(s)

3

Policy Owner	<input type="text"/>	Life Assured*	<input type="text"/>
Company	<input type="text"/>	Type of Plan	<div>Select</div>
Death Benefits*	<input type="text"/>	Disability Benefits	<input type="text"/>
Critical Illness Benefits	<input type="text"/>	Other Benefits	<input type="text"/>
Annual Premium*	<input type="text"/>	Premium Type*	<div>Select</div>
		Frequency	<div>Select</div>
Start Date	<input type="text"/>	Maturity Date	<input type="text"/>
Projected Lump sum at Maturity	<input type="text"/>	Affordability(%)	<input type="text"/>

Save

← Risk Profiling

Family Details →

Customer Fact Find

\$

5. Customer Fact Find - Existing Policy Details 2

MetLifeSM

Language : English

John Smith

Settings

Logout

Create Customer

Customer Fact Find

Financial Need Analysis

Sales Illustration

Existing Policy Details

Customer 1

Policy 1

Policy 2

Policy 3

+

Number of Existing Policy(s)

3

How much of your current income would you like to allocate for protection/retirement/education/savings/investment per month?

Protection

Retirement

Education

Savings

Investment

Do you have any other income during retirement(such as pension, annuity etc.)

NO

If yes, please specify

Save

← Risk Profiling

Family Details →

Customer Fact Find

\$

5. Customer Fact Find - Profile Status

Click on Financial Need Analysis to do FNA for this customer

Click on Sales Illustration to do an illustration for this customer

MetLife

Language : English

John Smith

Settings

Logout

Create Customer

Customer Fact Find

Financial Need Analysis

Sales Illustration

Profile Status

Customer 1

Customer Fact Find ☒

Financial Need Analysis

Income Replacement Assessment ☐

Child Education Fund Assessment ☐

Sales Illustration

No	Plan Code	Plan Name	Life Assured	ANB	Annual Premium	Sum Assured	Creation Date	
1	ALSC	AmMetLife SecureCare	Client	25	10,000.00	500,000.00	Jan 25, 2015	<input type="radio"/>
2	ULLA:	AmMetLife Lifestyle	Client	25	10,000.00	500,000.00	Jan 25, 2015	<input checked="" type="radio"/>
3	ALSC	NA	Client	25	NA	NA	Jan 25, 2015	<input type="radio"/>

Note - Record of Advice will be activated when at least one Sales Illustration is associated for the current customer profile.

Save

Family Details

Record of Advice

Customer Fact Find

\$

Person

Folder

Home

Click on Financial Need Analysis icon on the navigation to select a customer and do a FNA.

Click on Sales Illustration icon on the navigation to select a customer and do an illustration.

iPad

MetLife

Language : English John Smith Settings Logout

Customer Data Customer Fact Find Financial Need Analysis Sales Illustration

Record of Advice

Customer 1

Recommendation#1	Recommendation#2	Recommendation#3	Number of Recommendations #3
Illustration Selected	1		
Type of Plan		Term	
Sum Covered(RM)		Additional Coverage	
Name of policy owner		Frequency	Select
Premium(RM)		Bought	YES
Reason of recommending	Select		
Others			
Action taken by customer if different from recommendations			

Complete Sales illustration to proceed to declaration and conformation of advice

Save Profile Status Declaration and Acknowledgement

Customer Fact Find

MetLife

Language : English | John Smith | Settings | Logout

Customer Data | Customer Fact Find | Financial Need Analysis | Sales Illustration

Record of Advice

Customer 1

Recommendation#1	Recommendation#2	Recommendation#3
Illustration Selected	1	

Number of Recommendations #3

Type of Plan		Term	
Sum Covered(RM)		Additional Coverage	
Name of policy owner		Frequency	Select
Premium(RM)		Bought	YES
Reason of recommending	Select		
Others			

Action taken by customer if different from recommendations

Complete Sales illustration to proceed to declaration and conformation of advice

Save | Profile Status | Declaration and Acknowledgement

Customer Fact Find

iPad

MetLife SM

Language : English John Smith Settings Logout

Customer Data Customer Fact Find Financial Need Analysis Sales Illustration

Declaration and Acknowledgement

Customer 1

Customer

I/We acknowledge that the agent has explained the purpose of this Customer Fact Find Form to me/us and I/we have provided information to the best of my/our understanding and knowledge.

I/We acknowledge that a copy of this completed Customer Fact Find Form and the "Confirmation of Advice" will be sent to me together with the life policy insurance contract.

Name of Customer : BRIAN Date : 20/11/2014

Agent

I declare that I will treat the information provided to me in the Customer Fact Find Form with STRICT CONFIDENTIALITY and I will use it only for the purpose of fact finding in the process of recommending suitable insurance products and shall not use it for any other purposes.

The above analysis/advice is based on the facts furnished in the Form. I have taken reasonable steps to ensure that the advice is suitable for the client, having regard to the facts disclosed and other relevant facts which are made available to me.

I have also explained to the client about the features of the product recommended and have given sufficient information to enable the client to make an informed decision.

For leader/supervisor: I declare that I have reviewed this Customer Fact Find Form and to my best belief and knowledge, the advice and recommendation given by the intermediary is sound and appropriate (applicable for agent who has been contracted for one (1) year and below).

Name of Agent : KOK MAN WAH Date : 20/11/2014

Name of Leader :

Agent's status:

☒ One(1) Years and Below ☐ Above one(1) Years

Save Record of Advice Confirmation of Advice

Customer Fact Find

\$ ☎ 📁 🏠

5. Customer Fact Find - Declaration and Acknowledgement

iPad

MetLifeSM

Language : English

John Smith

Settings

Logout

Customer Data

Customer Fact Find

Financial Need Analysis

Sales Illustration

Confirmation of Advice

Customer 1

Customer's Name

Proposal No

Based on the information provided in the Customer Fact Find Form, I have concluded that the customer's prioritised financial goals are as follows :

1	Protecting yourself and your family against the financial impact due to death, disability and critical illness.
2	Planning for security during retirement.
3	Making provision for your children's education.
4	Saving for a specific need.
5	Making a lump-sum investment.

In order to meet these goals, I have recommended the above customer to purchase the following life insurance products :

Life Assured	Product Type	Term	Premium	Frequency	Sum Assured (RM)	Additional Coverage	Bought?
BRIAN	AmMetLife SecureBuilder	15	14,149.80	Yearly	80,000		Y
BRIAN	AmMetLife Medig Flexi	48	274.00	Yearly	-		Y

Generate PDF

Save

Declaration and Acknowledgement

Customer Fact Find

\$

6. FNA - Income Replacement Assessment - Income Replacement assessment

MetLifeSM Language : English John Smith Settings Logout

Create Customer Customer Fact Find **Financial Need Analysis** Sales Illustration

Income Replacement Assessment Customer 1

Designed for*

Current annual income* RM

Percentage income to be protected* 5% ⓘ

Desired income to be protected RM

Income Replacement Assessment Income Protection Assessment Income Need Analysis Summary ➔

Financial Need Analysis ☒ Income Replacement Assessment ☐ Child Education Fund Assessment

👤 🔍 🏠 📁 📞

6. FNA - Income Replacement Assessment - Income Protection assessment

MetLifeSM

Language : English

John Smith

Settings

Logout

Create Customer

Customer Fact Find

Financial Need Analysis

Sales Illustration

Income Replacement Assessment

Customer 1

Designed for*

Desired income to be protected

RM

Inflation rate*

5%

i

Projection of investment rate*

5%

i

Years of Income Protection*

3

i

Present Value (PV)
Capital Requirement (RM)

RM

Income Replacement Assessment

Income Protection Assessment

Income Need Analysis

Summary

\$ Financial
Need Analysis

Income Replacement
Assessment

Child Education
Fund Assessment

The screenshot displays the MetLife Financial Need Analysis app interface on an iPad. At the top, the MetLife logo is visible on the left, and the user's name "John Smith" is displayed on the right, along with "Language : English", "Settings", and "Logout" options. Below the header, a navigation bar shows four main sections: "Create Customer", "Customer Fact Find", "Financial Need Analysis" (the active section), and "Sales Illustration".

The "Financial Need Analysis" section is titled "Income Replacement Assessment" and is associated with "Customer 1". The main form area contains several input fields:

- "Designed for*" with an empty text box.
- "Capital required to fund income needs" with a value of "RM" and an empty input box.
- "Existing Funds available to fund income needs*" with a value of "RM" and an empty input box. Below this field, a note states: "(inclusive of savings, inevitable assets and sum assured of all insurance policies)".
- "Additional Capital required to fund income needs" with a value of "RM" and an empty input box. Below this field, a note states: "(if the value is negative, no additional funds are required)".

At the bottom of the screen, a progress bar indicates the current step in the process: "Income Replacement Assessment" (green dot), "Income Protection Assessment" (green dot), "Income Need analysis" (orange dot), and "Summary" (white dot). Below the progress bar, a navigation bar shows icons for a person, a search icon, a dollar sign, and three assessment categories: "Financial Need Analysis", "Income Replacement Assessment", and "Child Education Fund Assessment".

MetLife

Language : English

John Smith

Settings

Logout

Create Customer

Customer Fact Find

Financial Need Analysis

Sales Illustration

Income Replacement Assessment

Customer 1

Designed for*

Capital required to fund income needs

RM

Existing Funds available to fund income needs*

RM

(inclusive of savings, inevitable assets and sum assured of all insurance policies)

Additional Capital required to fund income needs

RM

(if the value is negative, no additional funds are required)

Income Replacement Assessment

Income Protection Assessment

Income Need analysis

Summary

Financial Need Analysis

Income Replacement Assessment

Child Education Fund Assessment

6. FNA - Income Replacement Assessment - Summary

MetLifeSM

Language : English

John Smith

Settings

Logout

Create Customer

Customer Fact Find

Financial Need Analysis

Sales Illustration

Income Replacement Assessment

Customer 1


Designed for*


Summary(Graph)


The amount of RM would help to ensure that your loved ones and family members can continue the current lifestyle if anything happens to you.

Allow us to use a simple illustraton to help you close the gap.

Graph Area


Generate PDF


Illustration




Profile Status


Income Replacement Assessment


Income Protection Assessment


Income Need analysis




Summary

 Financial Need Analysis

 Income Replacement Assessment

 Child Education Fund Assessment

6. FNA - Child Education Fund Assessment - Education Need assessment

MetLifeSM

Language : English

John Smith

Settings

Logout

Create Customer

Customer Fact Find

Financial Need Analysis

Sales Illustration

Child Education Fund Assessment

Customer 1

Designed for*

Child's Name*

Current Education Fees*

RM

Projection of Education cost inflation rate*

5%

Current age*

8

Uni/College/Entry Age*

21

No of Years to Uni/College

Projection of Education cost when your child is

years old

Year 1

Year 2

Year 3

Total

Education Fund Assessment

Education Need assessment

Financial Solution

Summary

Financial Need Analysis

Income Replacement Assessment

Child Education Fund Assessment

6. FNA - Child Education Fund Assessment - Education need assessment

MetLifeSM

Language : English

John Smith

Settings

Logout

Create Customer

Customer Fact Find

Financial Need Analysis

Sales Illustration

Child Education Fund Assessment

Customer 1

Designed for*

Child's Name*

Existing savings and Investable Available Assets for Education funding* :

RM

Yield

5%

i

Future Yearly savings and investment for your child until age 19* :

RM

Yield

5%

i

Projection of total savings and Investable assets for your child at age 19

RM

Additional funds required for Education Funding for your child at age 19:
(if the value is negative, no additional funds are required)

RM

i

Education Fund assessment



Education Need assessment


Financial Solution

Summary

←




→

 **Financial Need Analysis**

☐ Income Replacement Assessment

☒ Child Education Fund Assessment

6. FNA - Child Education Fund Assessment - Financial Solution

MetLifeSM

Language : English

John Smith

Settings

Logout

Create Customer

Customer Fact Find

Financial Need Analysis

Sales Illustration

Child Education Fund Assessment

Customer 1

Designed for*

Child's Name*

Projection of investment return(%)*

5%

i

Option A Yearly Investment required

RM

Option B Monthly Investment required

RM

Education Fund assessment

Education Need assessment

Financial Solution

Summary

Financial Need Analysis

Income Replacement Assessment

Child Education Fund Assessment

6. FNA - Child Education Fund Assessment - Summary

MetLifeSM

Language : English

John Smith

Settings

Logout

Create Customer

Customer Fact Find

Financial Need Analysis

Sales Illustration

Child Education Fund Assessment

Customer 1

Designed for*


Child's Name*

Summary(Graph)


To accumulate this amount of RM and to ensure that your child's education journey is not disrupted, should anything happen to you as the payor, we recommend that you take on the payor benefit rider for the plan.

Allow us to use a simple illustration to help you close the gap.


Graph Area



Generate PDF



Illustration





Profile Status


Education Fund assessment

Education Need assessment

Financial Solution




Summary



Financial Need Analysis

☐Income Replacement Assessment

☒Child Education Fund Assessment



7. Sales Illustration - Basic Information1

MetLifeSM

Language : English

John Smith

Settings

Logout

Create Customer

Customer Fact Find

Financial Need Analysis

Sales Illustration

Basic Information

Customer 1

Life Assured Details

CIK

Life Assured's Name*

Date Of Birth*

Gender *

Male

Female

Occupation*

Occupation Class

ANB*

Smoking Habit*

YES

Is life assured the policy owner?

YES

Sales Illustration

7. Sales Illustration - Basic Information1

MetLifeSM

Language : English

John Smith

Settings

Logout

Create Customer

Customer Fact Find

Financial Need Analysis

Sales Illustration

Basic Information

Customer 1

Life Assured Details

CIK

Life Assured's Name*

Date Of Birth*

Gender *

Male

Female

ANB*

Occupation*

Smoking Habit*

Occupation Class

Is life assured the policy owner?

Policy Owner Details

CIK

Policy Owner Name

Gender

Relationship

Date Of Birth

Occupation

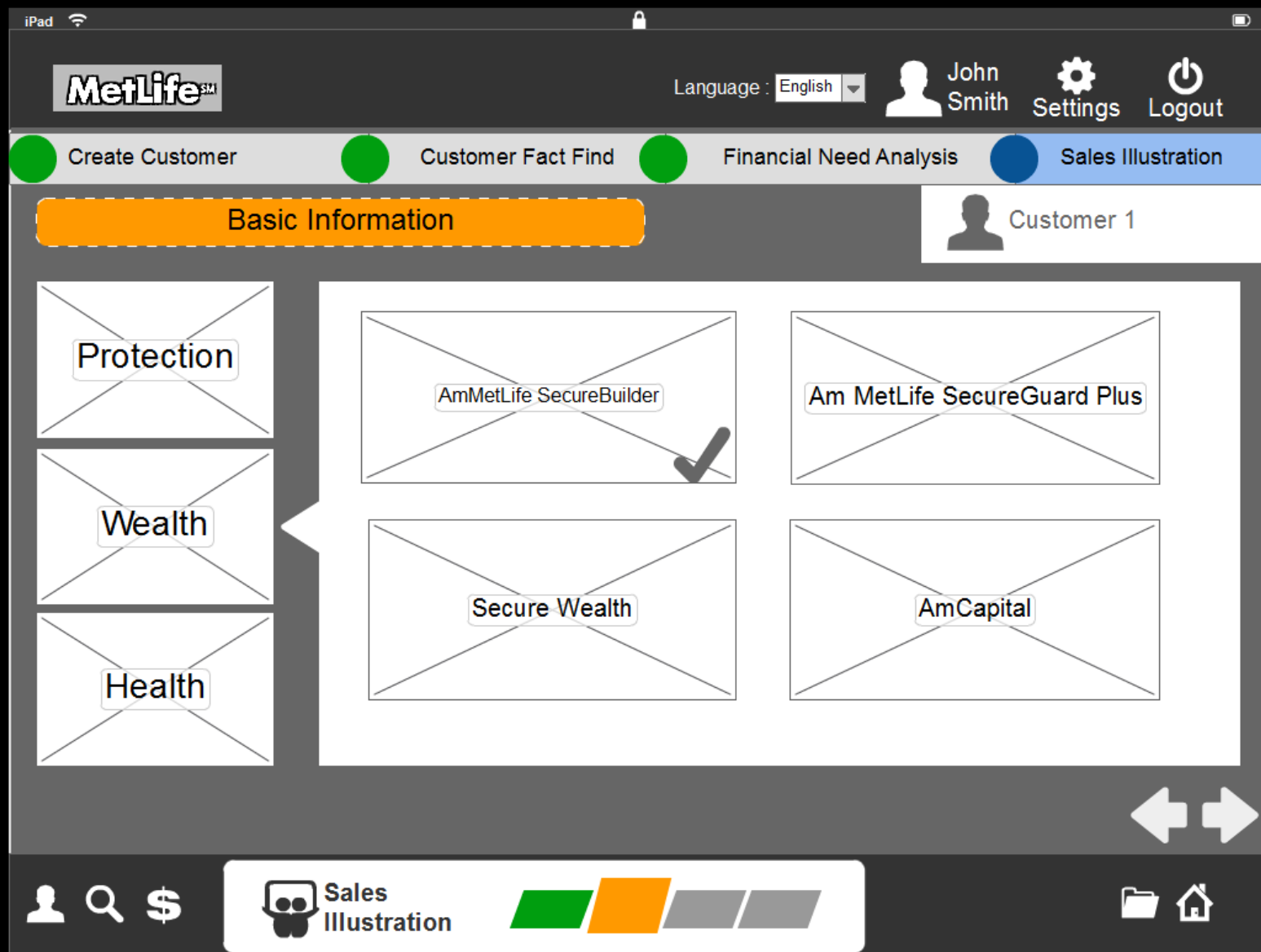
Smoking Habit

Occupation Class

➔

Sales Illustration

7. Sales Illustration - Basic Information1



7. Sales Illustration - Basic Information1

MetLifeSM

Language : English
 John Smith Settings Logout

Plan

Plan Code	<input type="text" value="ULLA5"/>	Policy Term	<input type="text" value="74"/>
Plan Name	<input type="text" value="AmMetLife Lifestyle"/>	Premium Term	<input type="text" value="74"/>
Sum Assured(RM)	<input type="text"/>	Payment Frequency	<input type="button" value="Select"/>
Insurance Portion	<input type="text"/>	Yearly Premium	<input type="text"/>

Customer 1

Premium(RM)

 Yearly
 Half Yearly
 Quarterly
 Monthly

Riders

Code	Rider Name	Term	Sum Assured	Premium
CITX	Critical Illness Term Rider	<input type="text" value="25"/>	RM 10,000.00	RM 50,000.00

☐ Level Term Rider

☐ Critical Illness Rider

☐ Deferred Disability Income Rider

☐ Dread Disease Waiver of Premium Rider

☐ Comprehensive Accident Indemnity Rider

☐ Hospital Benefit Rider

☐ Brochure

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Sales Illustration

7. Sales Illustration - Basic Information¹

Language : English
 John Smith
 Settings
 Logout

Create CustomerCustomer Fact FindFinancial Need AnalysisSales Illustration

Summary Information

Name of Product AmMetLife SecureBuilder

Proposed Life Assured Name : CLIENT (ANB 25, Male, Non-Smoker)

Customer 1

Graph

	GUARANTEED (Table A) (Basic and Riders, if any)					NON-GUARANTEED Total						
	Total Premium (Beginning Of Year)	Cash Value	Death Benefit	Guaranteed Annual Cash Payment payable	Total Premium (Beginning Of Year)	Cash Dividend		Guaranteed Annual Cash Payment Accumulated with Interest		Cash Dividend Accumulated with Interest		Termin Payabl
						Scenario A	Scenario B	Scenario A	Scenario B	Scenario A	Scenario B	
End of Policy Year (t)												
1	14,148.60	0	80,400	600	131.55	0	0	600	600	0	0	€
2	14,148.60	0	79,800	600	131.55	328	223	1,229	1,219	328	223	€
3	14,148.60	5,412	79,200	600	131.55	748	507	1,890	1,856	1,093	737	€
4	14,148.60	15,022	78,600	600	131.55	1,132	766	2,583	2,514	2,278	1,526	€
5	14,148.60	25,247	78,000	600	131.55	1,605	1,083	3,310	3,192	3,995	2,656	€
6	14,148.60	35,203	76,200	1,800	131.55	2,118	1,423	5,272	5,090	6,309	4,162	€

Sales Illustration

[View Graph](#)

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[Profile Status](#)