MetLife Malaysia Mobile Application Development

Mobile Office System UI/UX Scenario

V1.4

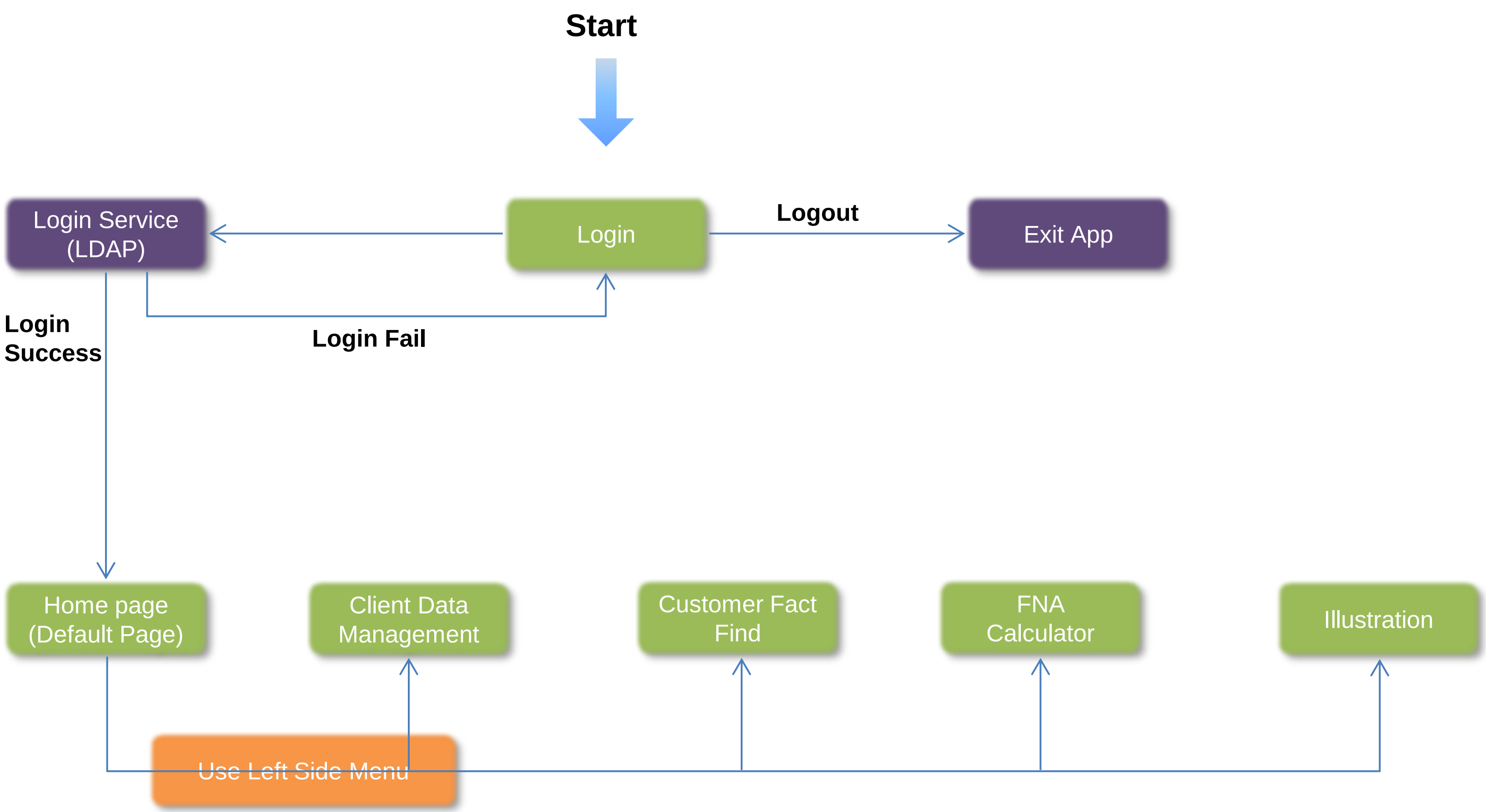
18. 07. 2014

1. Login & Main

1.1 Login

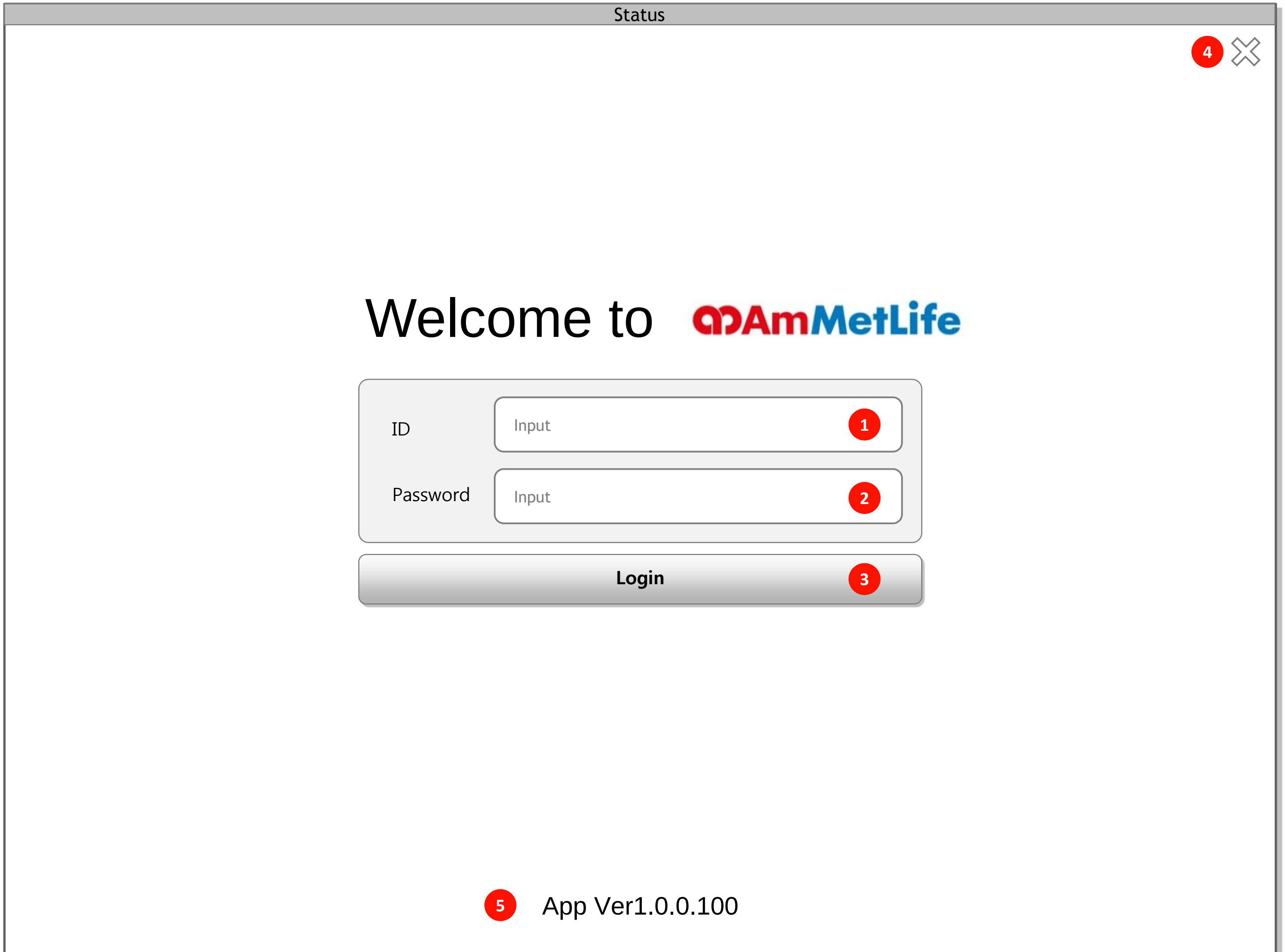
1.2 Main

1.Login & Main


Start
Login Service (LDAP)
Login
Logout
Exit App
Login Success
Login Fail
Home page (Default Page)
Client Data Management
Customer Fact Find
FNA Calculator
Illustration
Use Left Side Menu

1. Login & Main

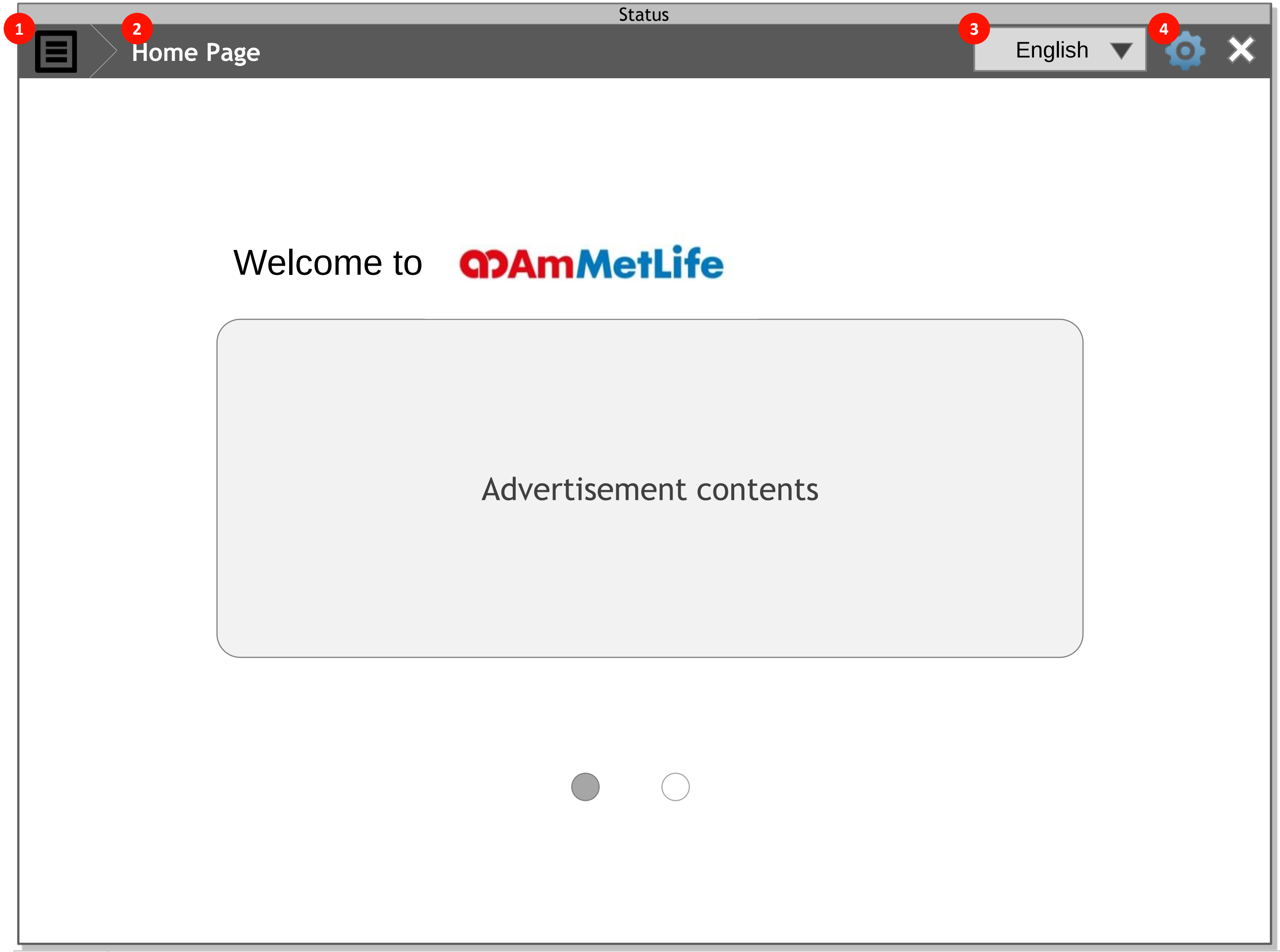
1.1 Login



Description	
*	Login to LDAP.
1	[ID] Input Box
2	[Password] Input Box : • Password are displayed in asterisks (“*”)
3	[Login] Button
4	[X] Button : • Button to exit application • Pop-up alert to confirm exit
5	Version info : •Show application & contents version

1. Login & Main

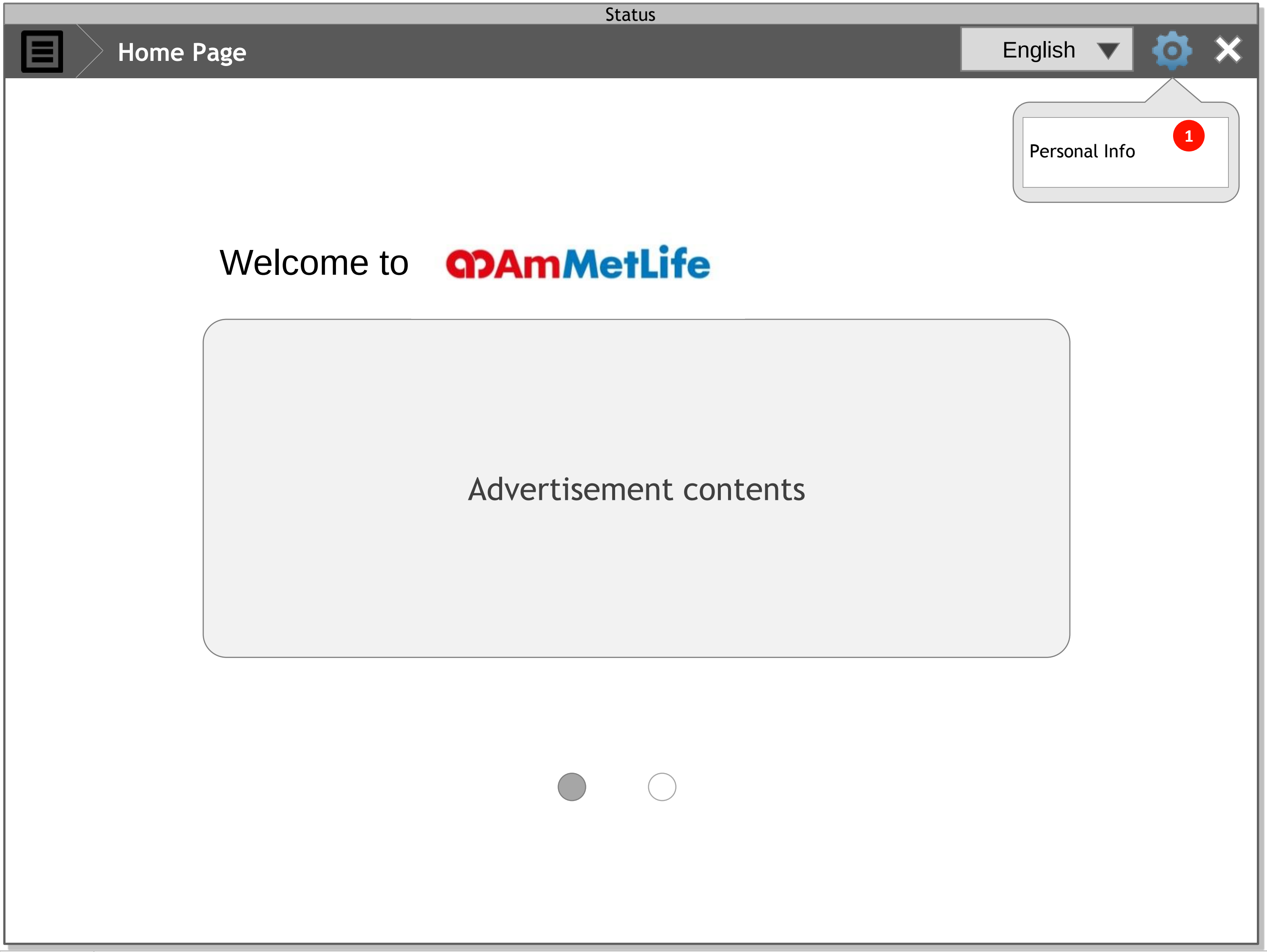
1.2 Main (Default : Home Page)



Description	
*	Homepage is shown after login.
1	[Menu] Button : •Shows menu bar. •Home Page, Client Data Management, Customer Fact Find, Financial Analysis, Sales Illustration
2	[Navigate] info •Display name of current showing page.
3	[Language option] Dropdown : •Shows selected option. •English, 中文, BM is shown when user taps Selected option is disabled and only other options can be selected.
4	[option] Button : •Shows setting options

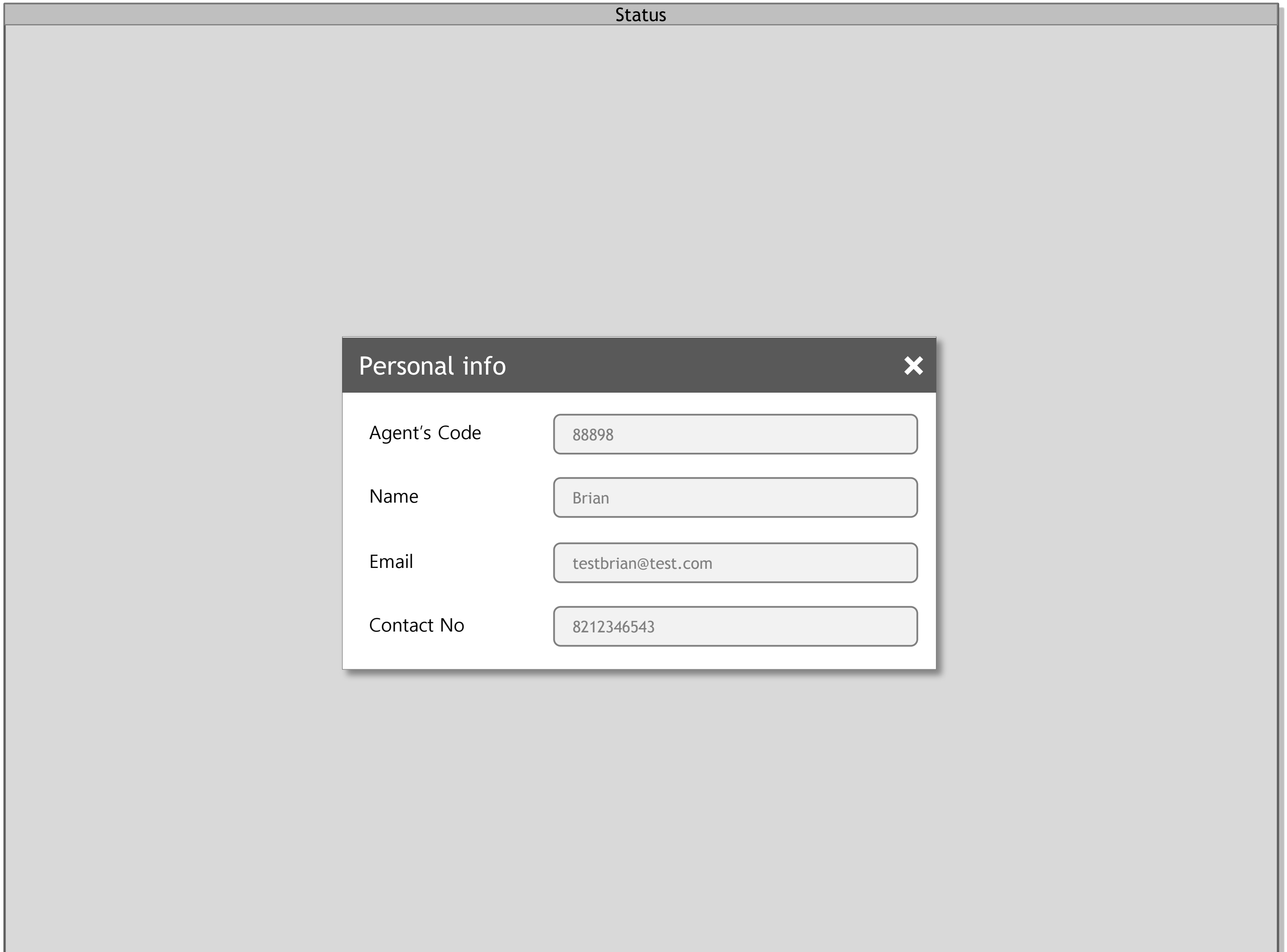
1. Login & Main

1.2 Main (Clicked option button)



Description	
1	[Personal Info] Button : •Display Personal Info Popup.

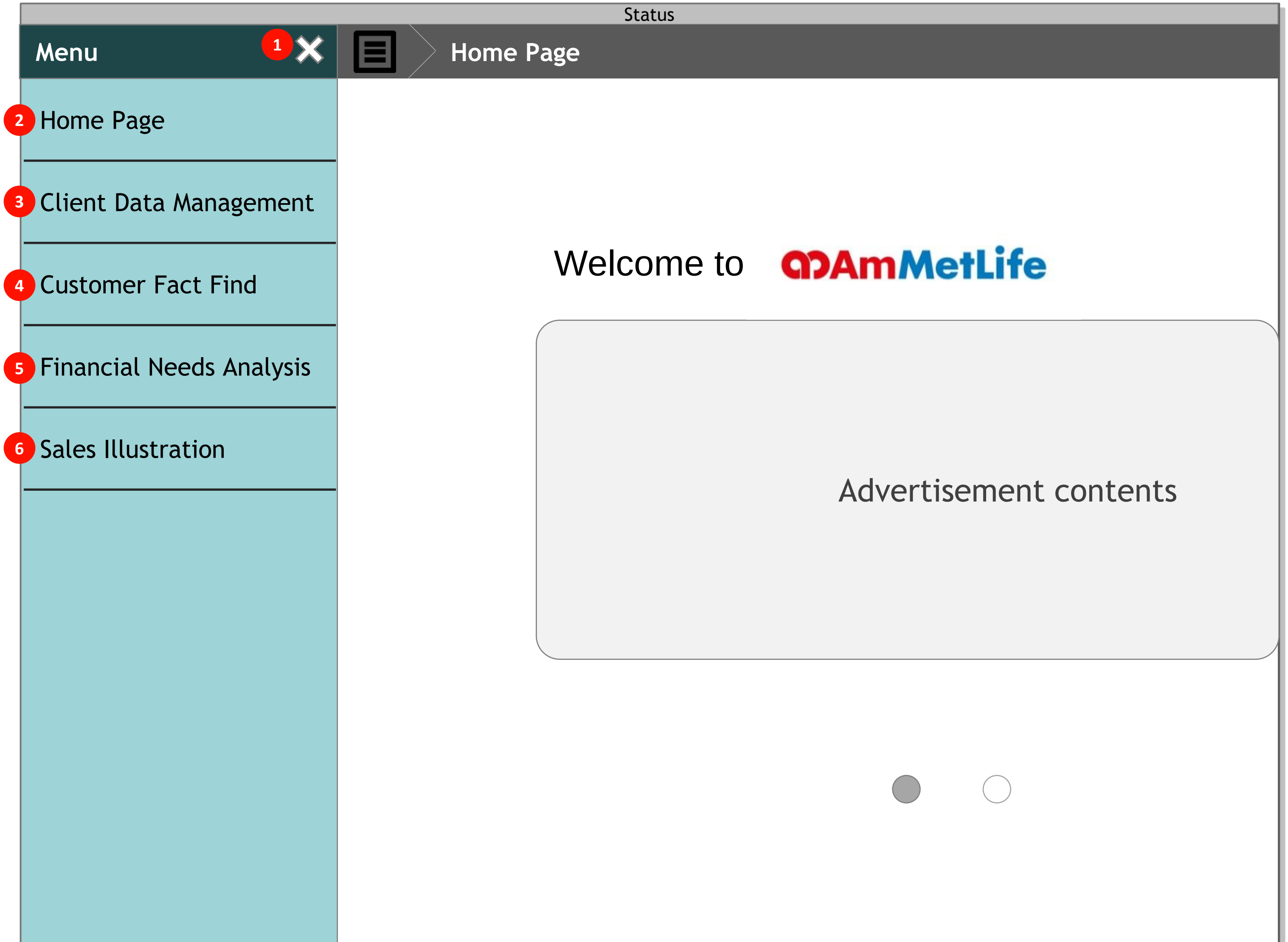
1.2 Main – Personal Info Popup



	Description
*	Display user info downloaded from LDAP. Can not edit. Agent info will be populated in FNA, SIS, CFFF.

1. Login & Main

1.2 Main – Clicked Menu Button



Description	
*	When a module is entered from main menu, it will initialize data and start from fresh.
1	[Close] Button : •Hide menu bar.
2	[Home Page] Button: •Go to Home Page.
3	[Client Data Management] Button: •Go to ‘Client Data Management’ page.
4	[Customer Fact Find] Button: •Go to ‘Customer Fact Find’ page.
5	[Financial Analysis] Button: •Go to ‘Financial Analysis’ page.
6	[Sales Illustration] Button: •Go to ‘Sales Illustration’ page.

2. Home Page

2.1 First Page

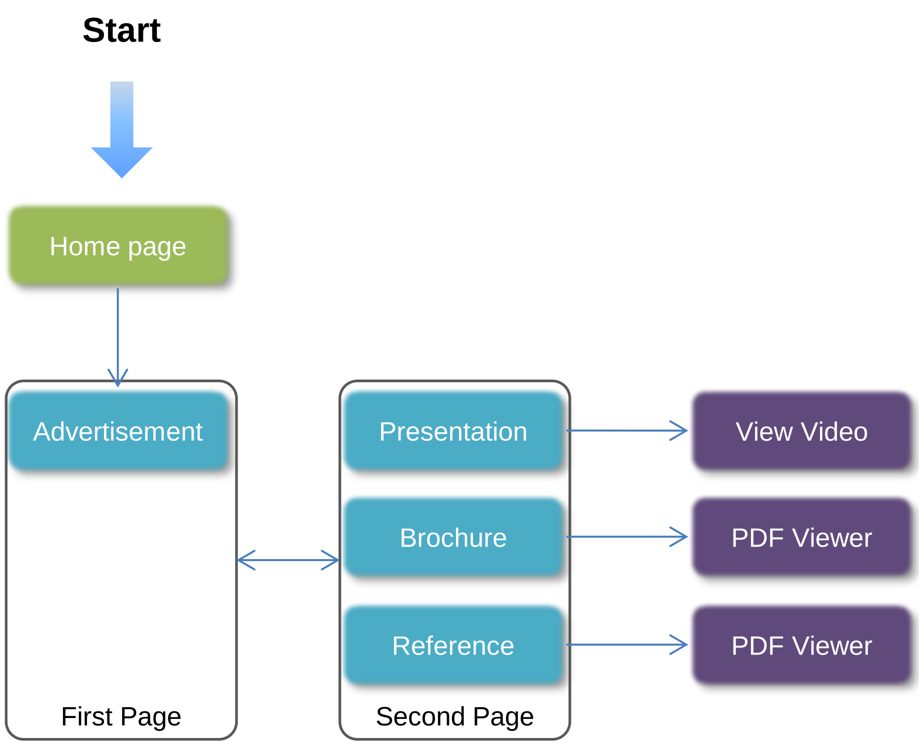
2.2 Second Page

2.3 Sales Presenter

2.4 Brochure

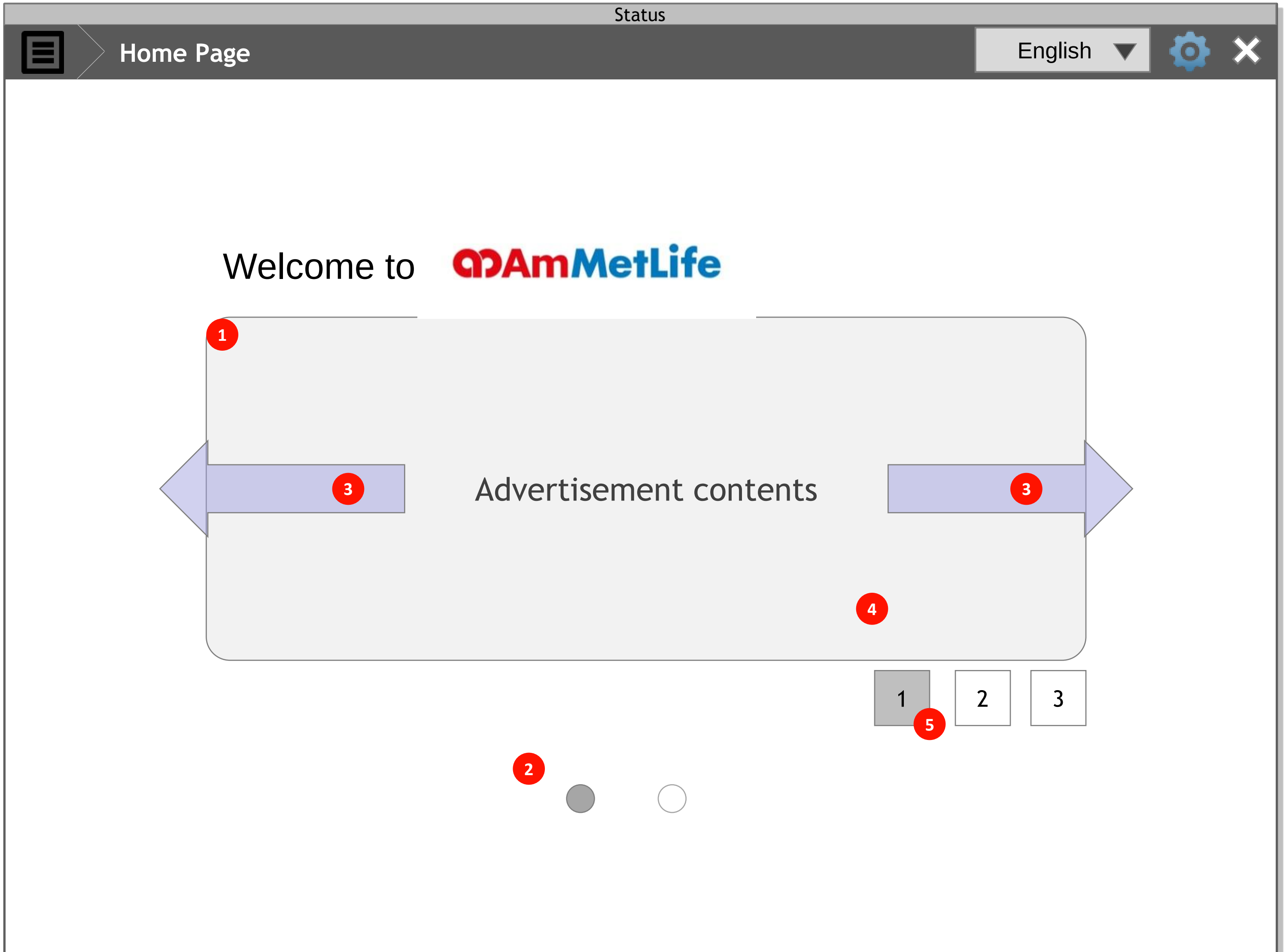
2.5 Reference

2.Home Page


Start
Home page
Advertisement
First Page
Presentation
Brochure
Reference
Second Page
View Video
PDF Viewer
PDF Viewer

2. Home page

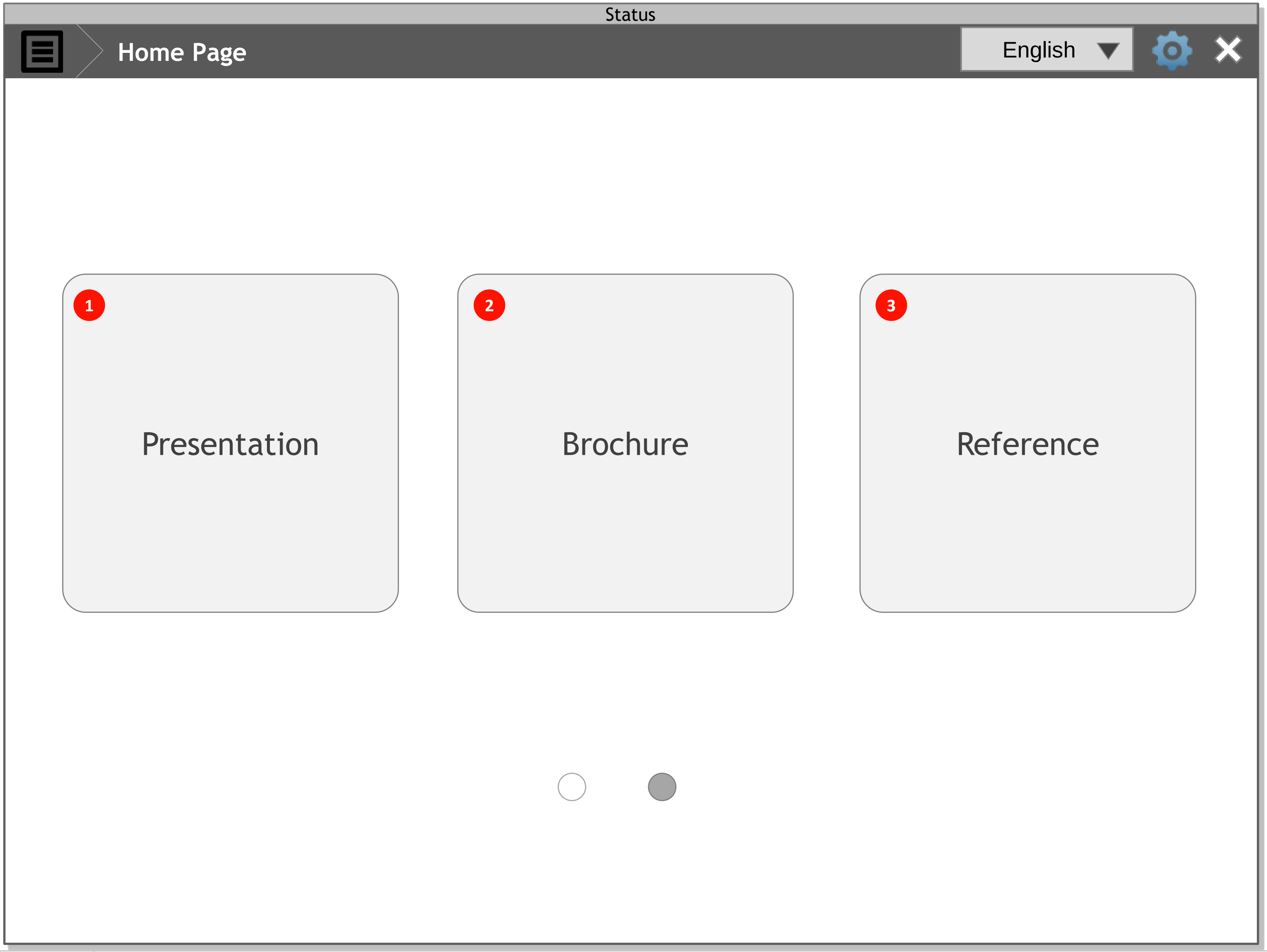
2.1 First Page



Description	
1	[Advertisement] area: • Contents will be sent by MetLife.
2	Current page title is displayed
3	Flicking page function is provided.
4	If more than 2 ads, it will auto-run. How many seconds for each ad is configurable.
5	User can directly go to specific ad. Once ad is selected, auto-run will still navigate to next ad.

2. Home page

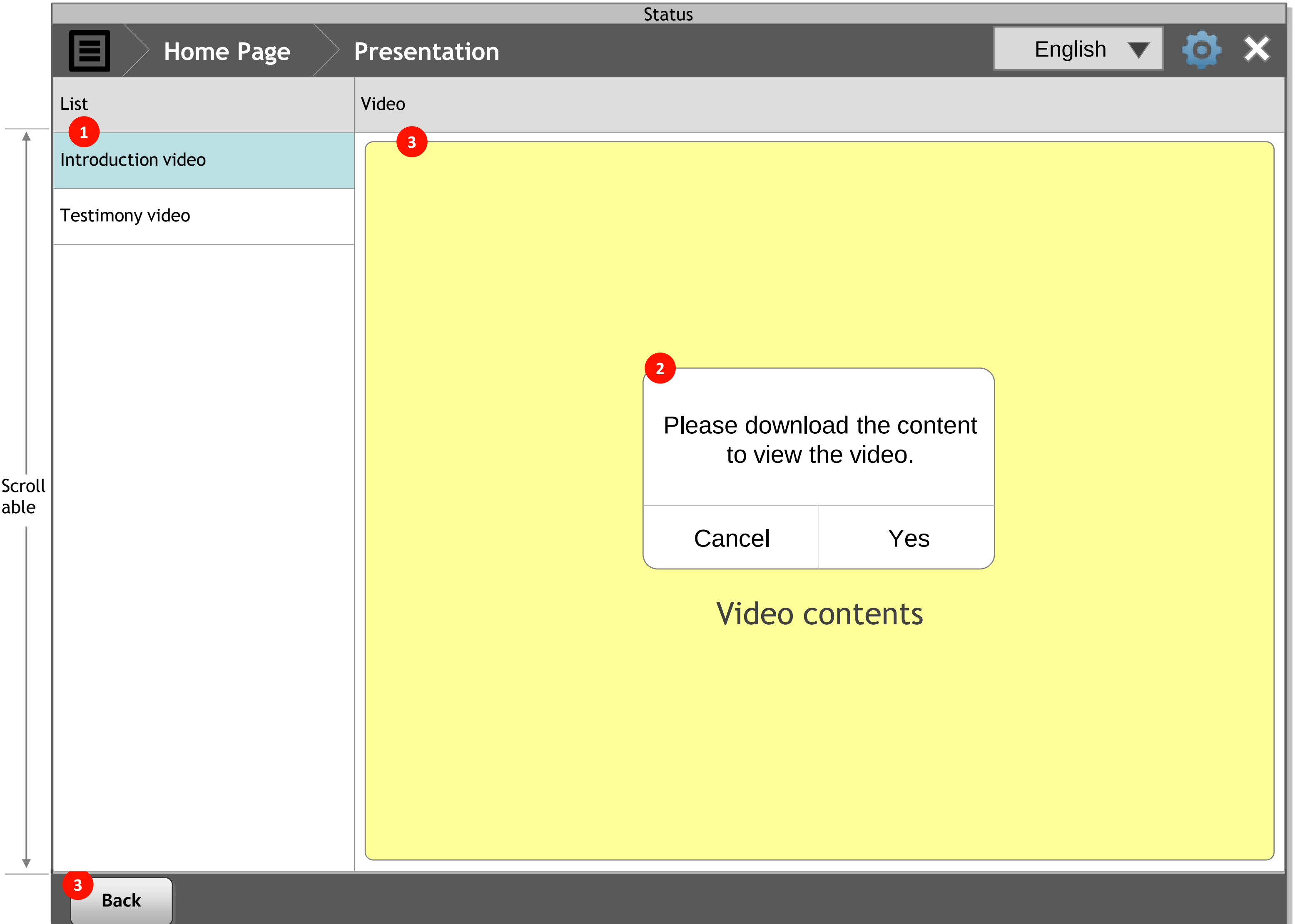
2.2 Second Page



Description	
1	[Sales Presenter] Button: •Go to ‘Sales Presenter’ page
2	[Brochure] Button: •Go to ‘Brochure’ page
3	[Reference] Button: •Go to ‘Reference’ page

2. Home page

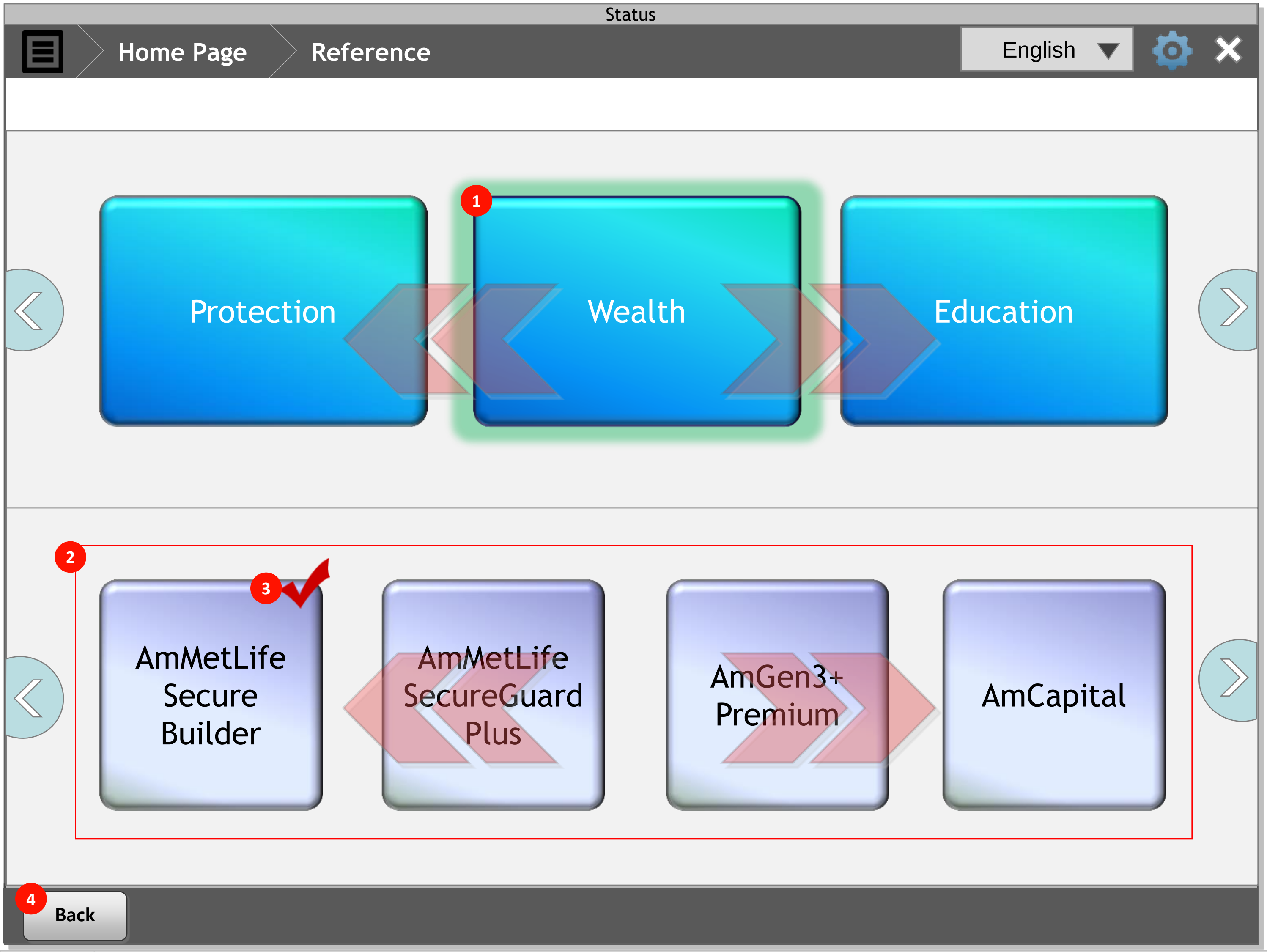
2.3 Presentation



Description	
*	This module shows Presenter Video.
1	[Presentation Video] List: •Video list is displayed. • User can click on the title to select video to be viewed
2	Video contents: • If video content is not downloaded before, MOS will prompt user to download the contents first. • If user selects yes, progress bar will appear to show download percentage. • If video content already exist in app, then popup will not be displayed. User can view the video file without download • If user selects cancel, download prompt popup will disappear and video title will be unselected. User needs to re-select the video they want to view.
3	Video clip play window: • Once download is complete, user can play video file. • Video file will be played in the yellow shaded window. (NOT entire device screen)

2. Home page

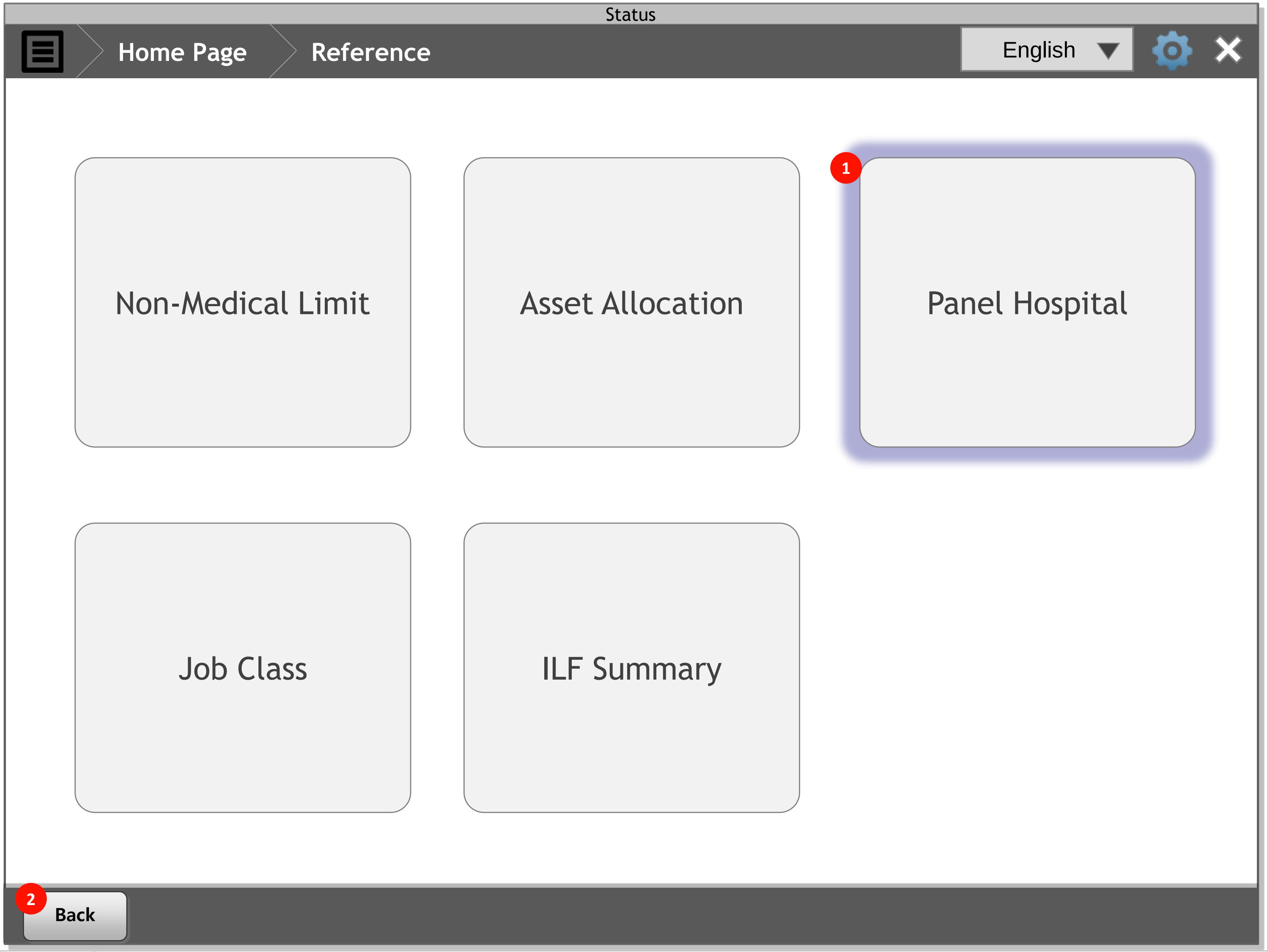
2.4 Brochure



Description	
*	This screen is a repository of all the relevant brochures in PDF format.
1	[Category] Button: •Protection, Wealth, Education, Health •User can flick and select product pillar
2	Plan is shown at the bottom
3	When a plan is selected, PDF will be displayed
4	[Back] Button: •Go to 'Home Page'

2. Home page

2.5 Reference



Description	
*	This module is a repository of all the relevant brochures in PDF format.
1	Reference item: •Non-Medical Limit, Asset Allocation, Job Class, ILF Summary pdf will be displayed •Panel Hospital will display Panel Clinic & Hospital Filter popup **•In case more references are added, screen will scroll**
2	[Back] Button: •Go to ‘Home Page’

2. Home page

2.5 Reference - Panel Clinic & Hospital Popup

Status

Panel Clinic & Hospital

1 Hospital Type: -Select-

State: -Select-

Search

Doctor/Hospital Name	Bank Name
2 Kelinik Malaysia	AmBank (M) Berhad
Poliklinik Rozikin	MayBank Islamic
Klinik Sharifah Fadzlon	EON Bank
Poliklinik Hidayah	Bank Islam Malaysia Berhad
Elizabeth Medical Centre S/B	Public Bank Bhd
Poliklinik Perdana	Alliance Bank Malaysia Bhd
Poliklinik Hidayat	RHB Bank Berhad

3 View PDF

	Description
1	[Hospital Type] Dropdown: Panel Clinic list AmPreferred Panel Hospital list AnMedicFlexi Panel Hospital list [State] Dropdown: •ALL, Johor Bahru, Kedah Darul Aman, Kelantan Darul Naim, Negeri Sembilan, Pahang Darul Makmur, Penang , Perak Darul Ridzuan, Selangor Darul Ehsan, Terengganu Darul Iman, Sabah, Sarawak, Wilayah Persekutuan, Melaka, Perak Darul Ridzuan
2	Doctor/Hospital info is filtered based on state
3	[View PDF] Button: • PDF will display entire hospital list. MOS will NOT be generating pdf for filtered hospital list.

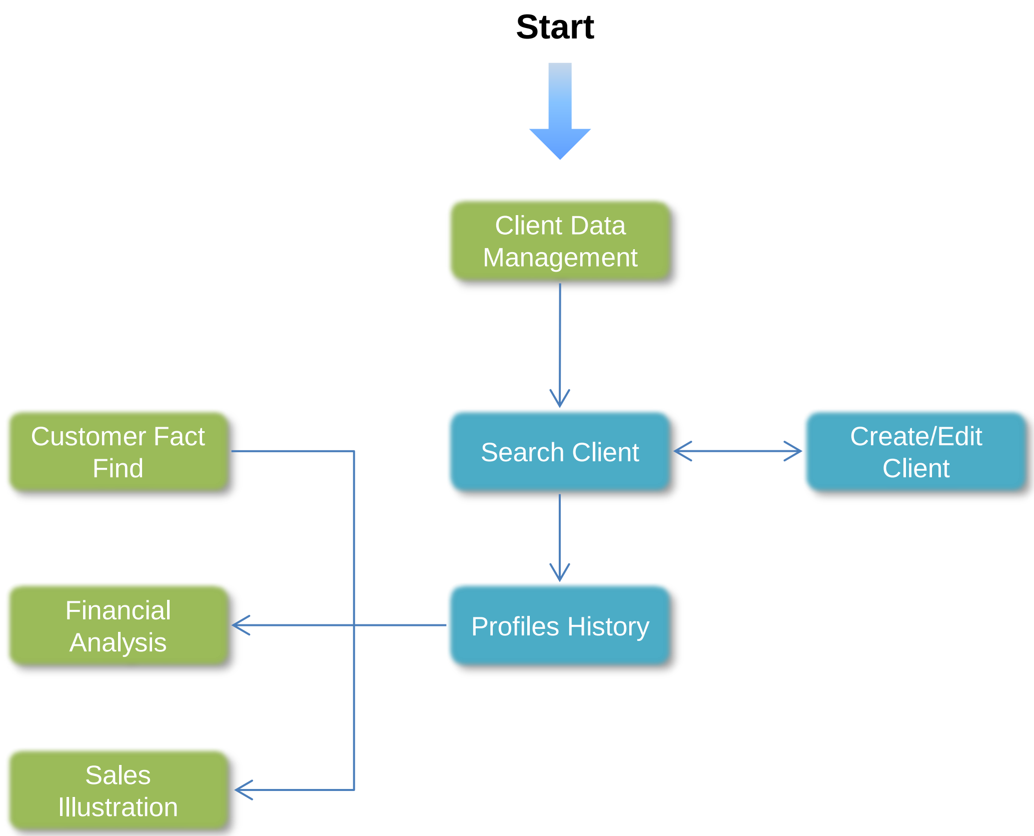
3. Client Data Management

3.1 Search Client

3.2 Create/Edit Client

3.3 Profiles History

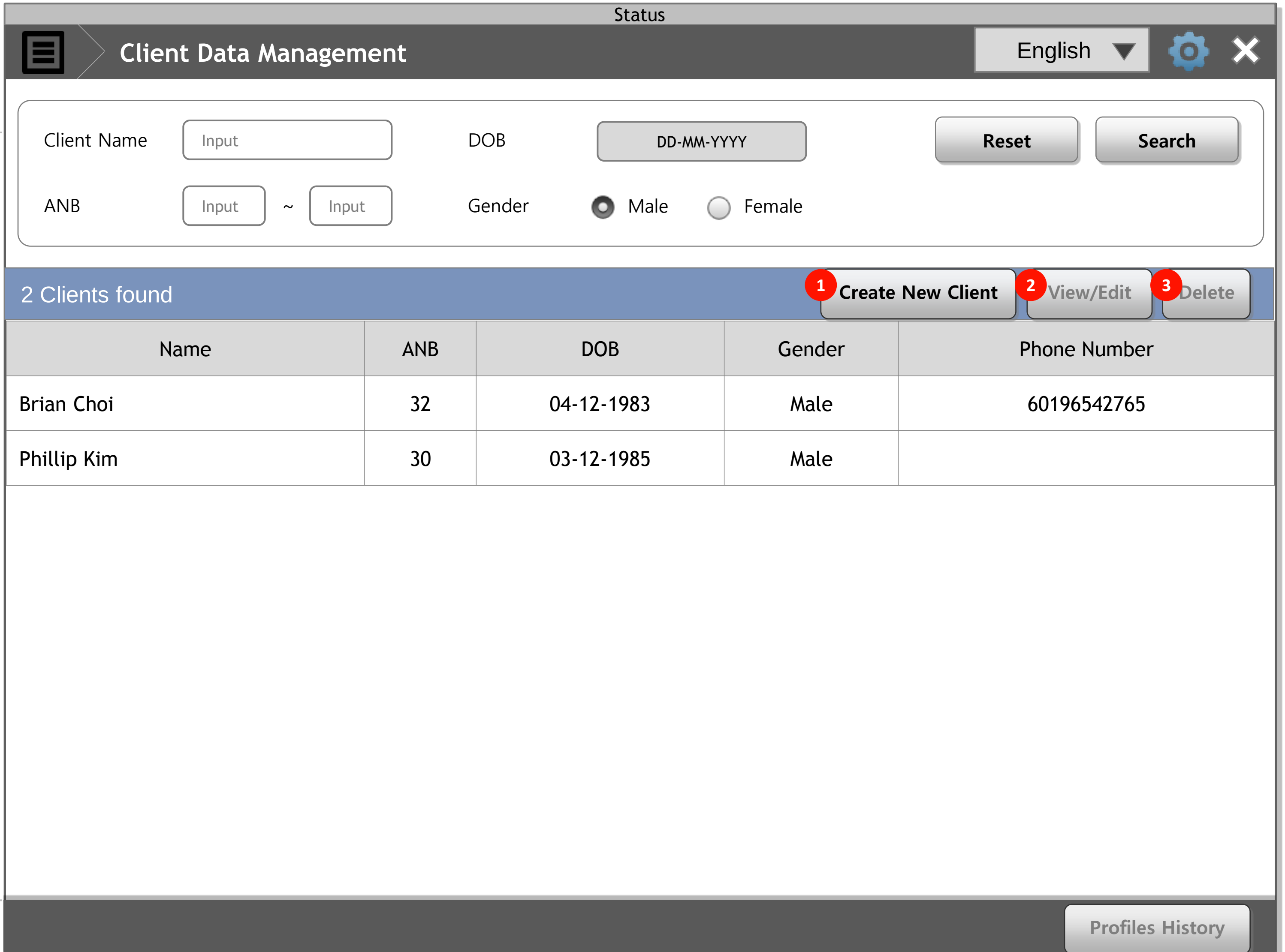
3.Client Data Management



3. Client Data Management

3.1 Search Client

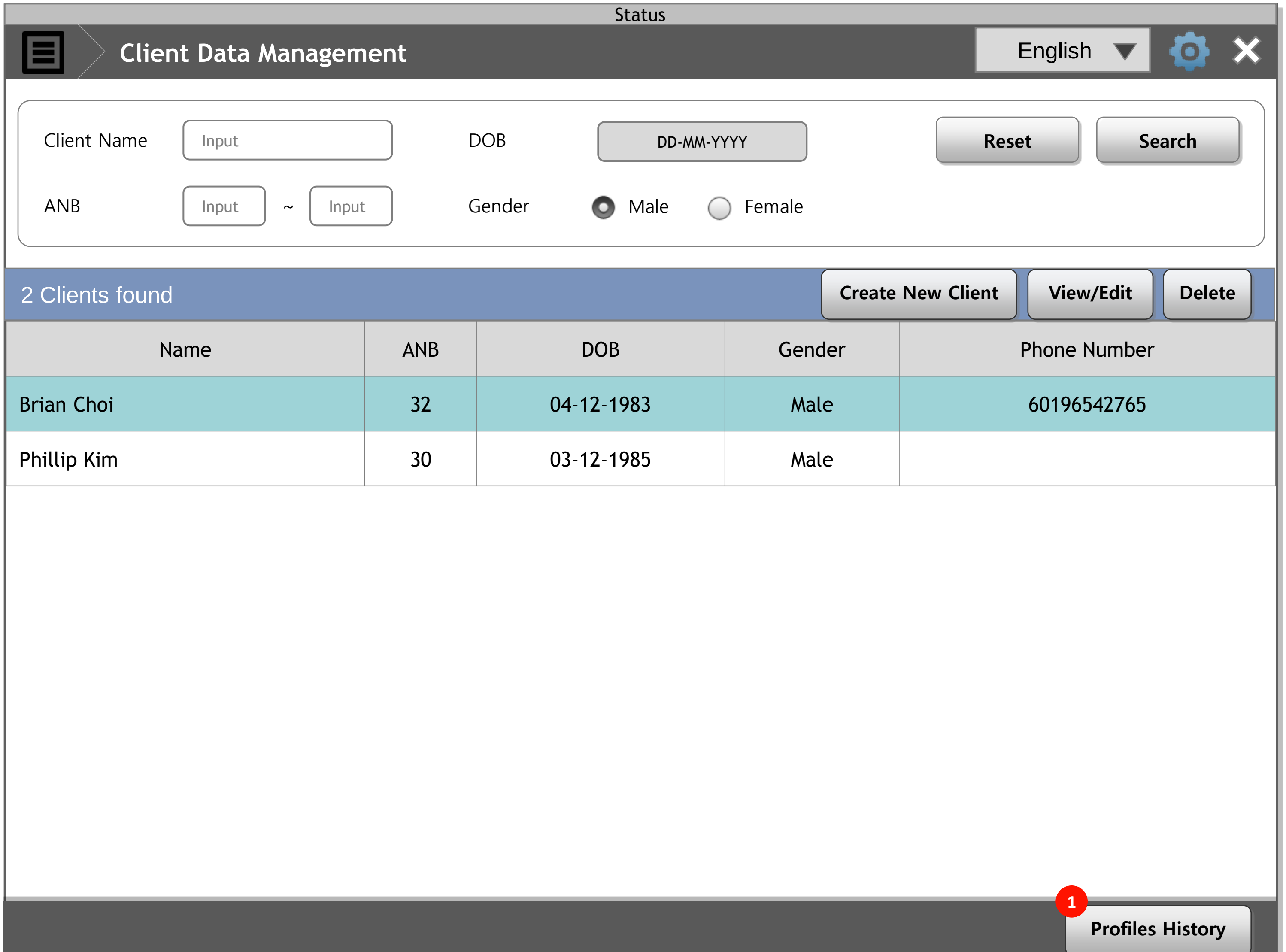
Scroll able



Description	
*	This module is a repository of all the relevant brochures in PDF format.
1	[Create New Client] Button: •Go to ‘Create Client’ page •Always enabled
2	[Edit] Button: •Default : disabled •After select a client, be enabled
3	[Delete] Button: •Default : disabled •After select a client, be enabled

3. Client Data Management

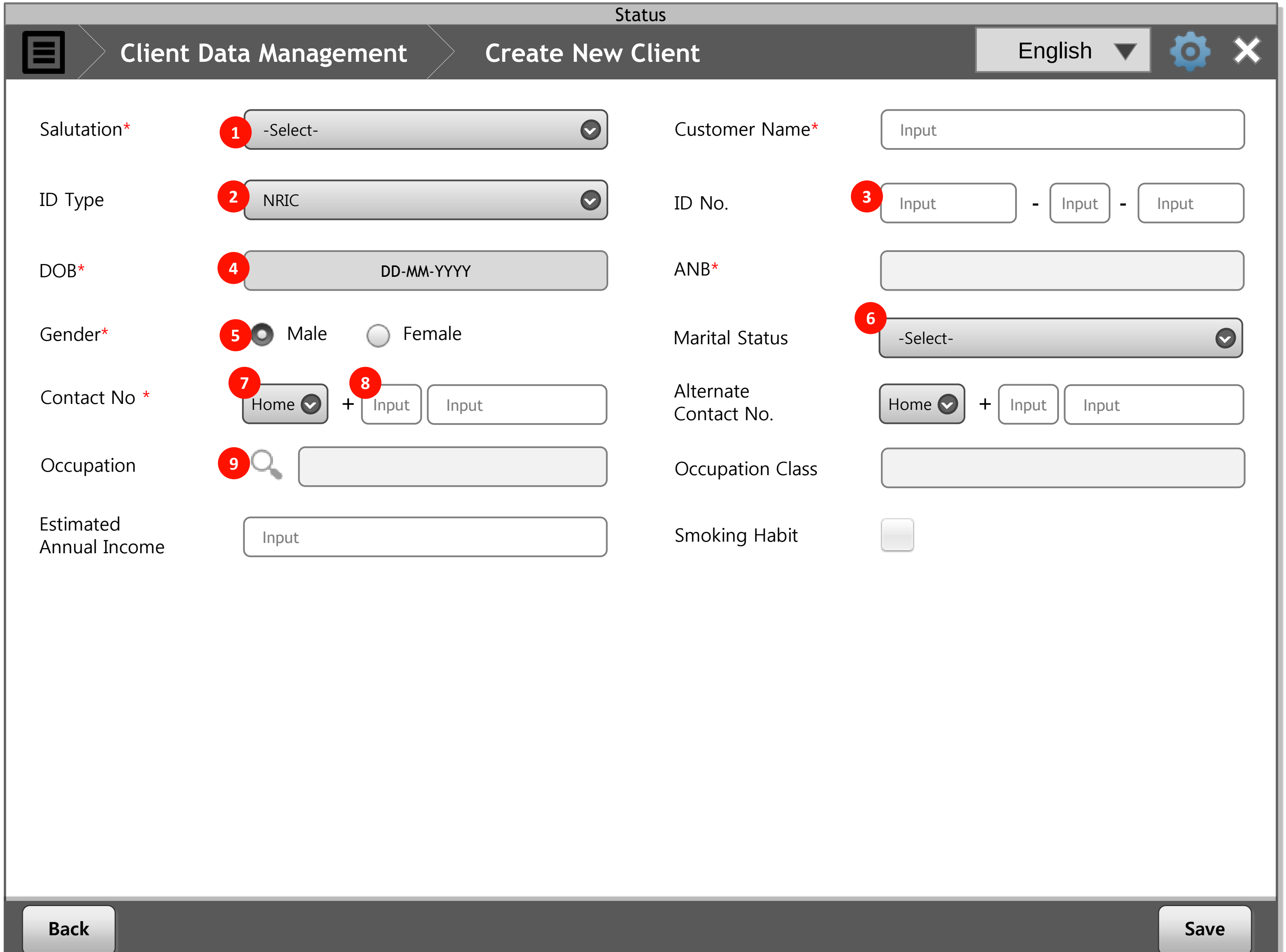
3.1 Search Client



Description	
*	This module is a repository of all the relevant brochures in PDF format.
1	[Profiles History] Button: •Default : disabled •After select a client, be enabled •Go to 'Profiles History' page

3. Client Data Management

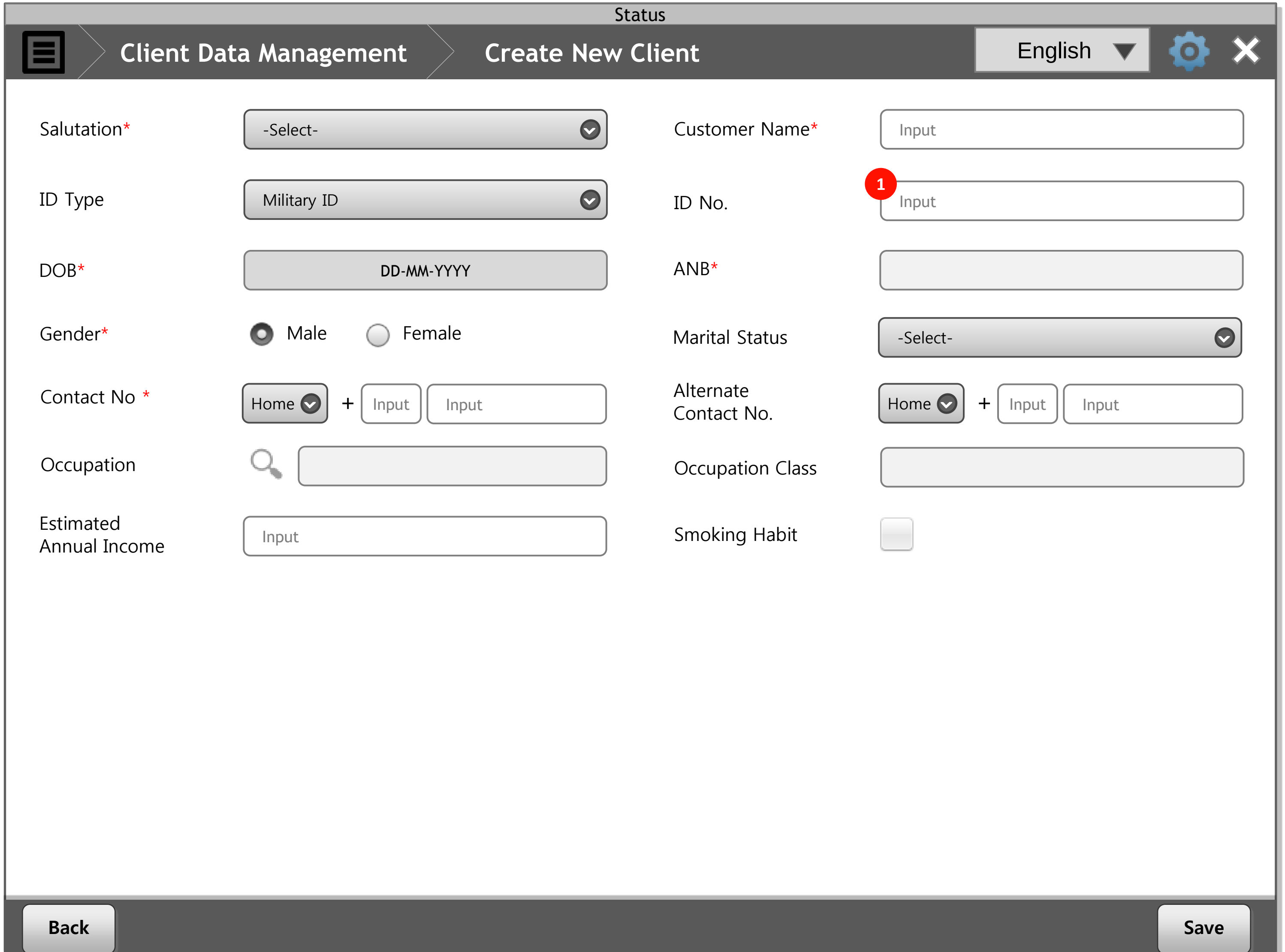
3.2 Create/Edit Client



Description	
*	Mandatory field : Salutation, Customer Name, DOB, ANB, Gender
1	[Salutation] Dropdown:
2	[ID Type] Dropdown: •NRIC, Military ID, Police ID, Birth Certificate, Passport, Others
3	[ID NO] Text input: •If ID Type is NRIC, 3 input format will be displayed. For others, show free text input with 15 character length.
4	[DOB] Date Picker: •ANB is auto calculated.
5	[Gender] Radio Box: •Default: Male
6	[Marital Status] Dropdown: •Single, Married, Widowed, Divorced
7	[Contact Type] Dropdown: •Home, Mobile
8	[Country Code] •No validation
9	[Occupation] Button: •Display Search Occupation Popup •Occupation Class is auto populated

3. Client Data Management

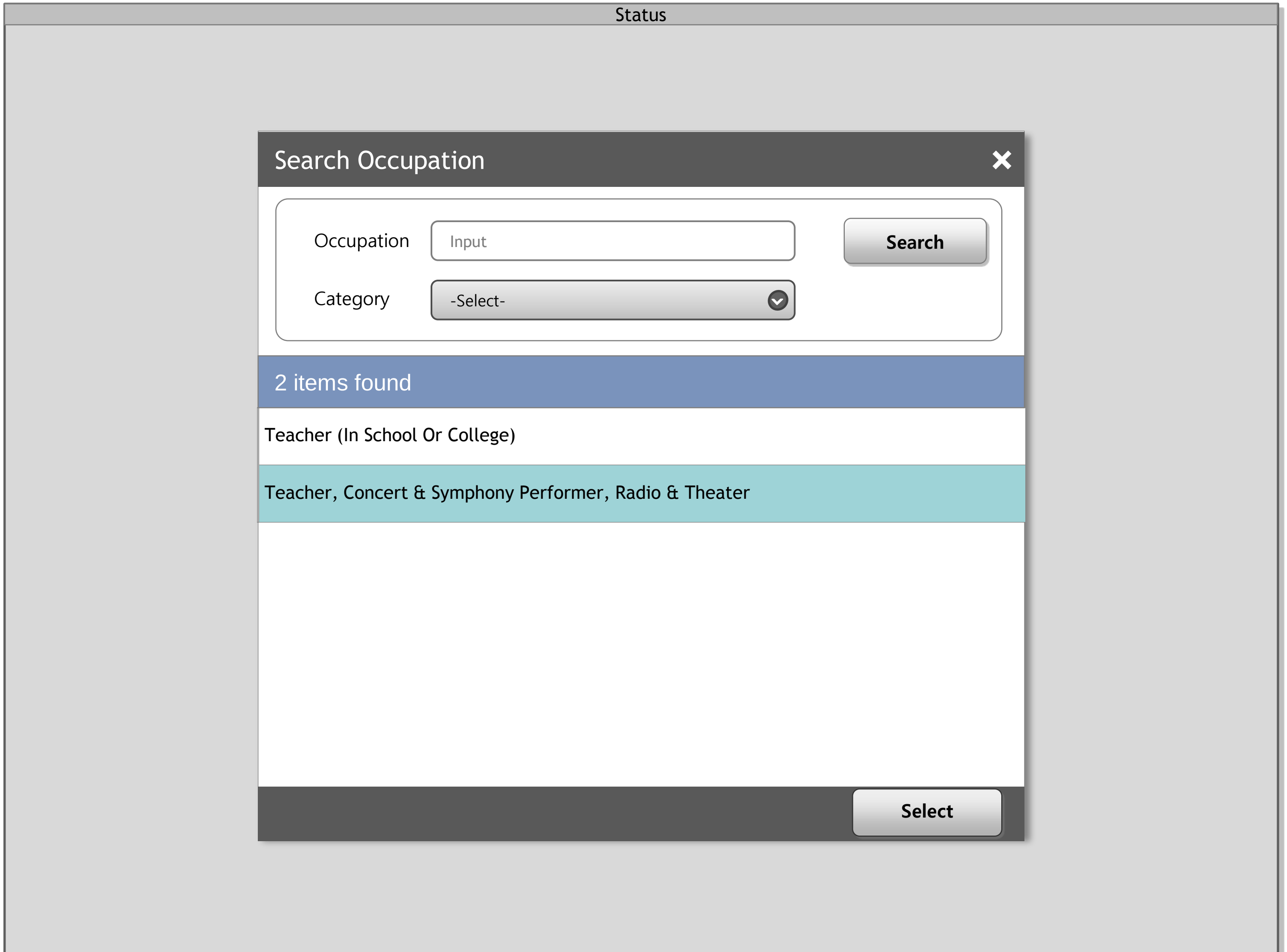
3.2 Create/Edit Client – If ID Type is not NRIC



	Description
1	[ID NO] Text input: •If ID Type is NRIC, 3 input format will be displayed. For others, show free text input with 15 character length.

3. Client Data Management

3.2 Create/Edit Client – Search Occupation Popup



Description	
*	Search result is Filtered by Occupation & Category.

3. Client Data Management

3.3 Profiles History

Status

Client Data Management | Profiles History | English

6 Brian Choi has 3 Profiles.

1 Create New Profile | 2 Delete

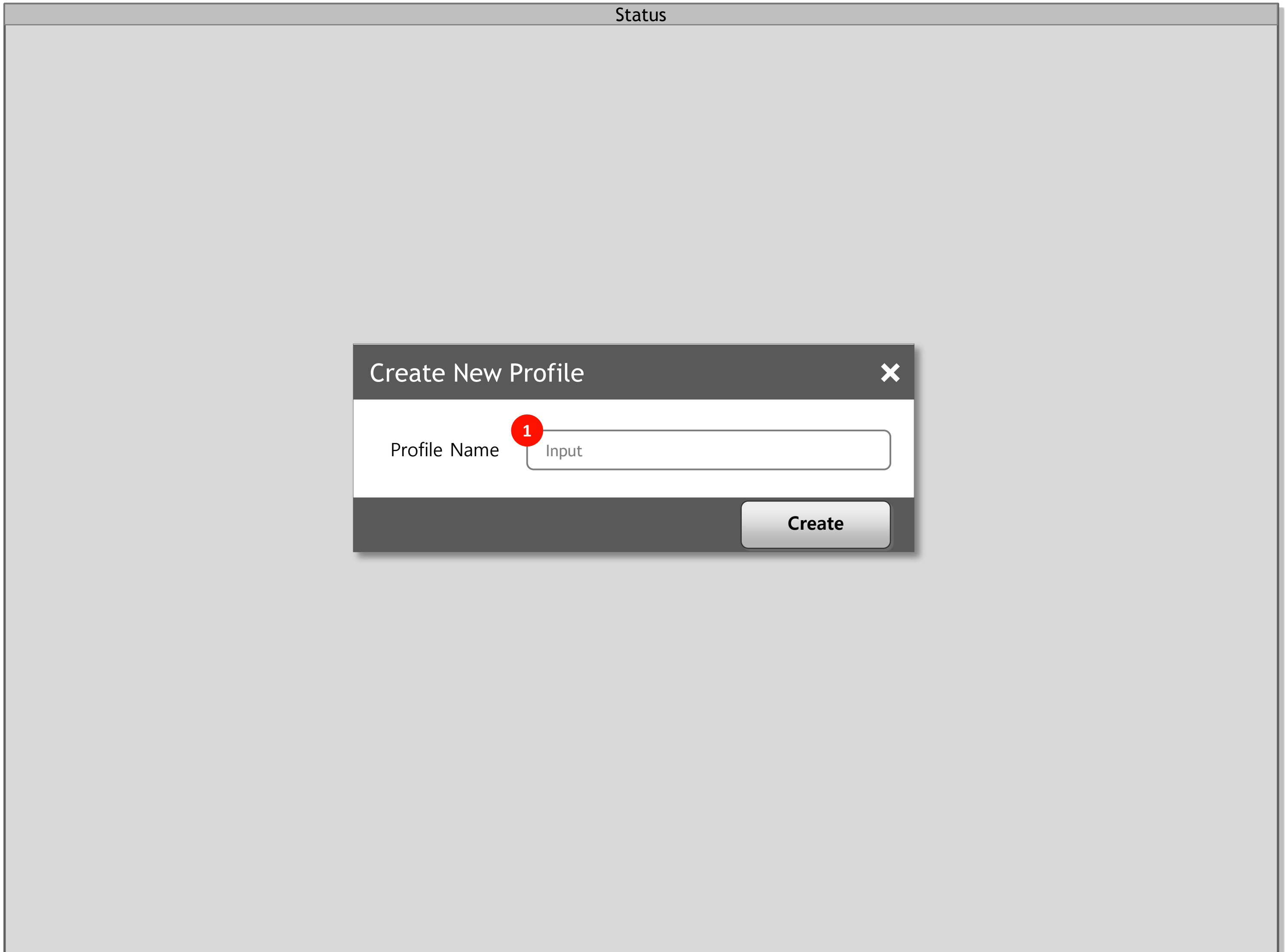
Profile Name	Updated Date	Recommended Product	CFFF	FNA	SIS
For his son	01-07-2014	AmMetLife Protect 99	3 Completed	4 Linked 1	5 Linked 2
AMPRT	25-06-2014	AmCapital	N/A	N/A	Linked 1
ULLA5	11-06-2014	AmUni Education	N/A	Linked 1	Linked 1
New prospect	11-06-2013	N/A	incomplete	Linked 1	N/A

Back | Customer Fact Find | Financial Analysis | Sales Illustration

Description	
1	[Create New Profile] Button: •Show Create New Profile Popup •New profile is displayed in the list after created
2	[Delete] Button: •Can delete profile.
3	CFFF Status: •N/A, Incomplete, Pending Signature, Completed.
4	FNA Status: •N/A, Linked 1, Linked 2, Linked 3 •Max 3 SIS can be generated. 1 FNA is mapped per SIS. Hence max 3 FNA can be linked to SIS.
5	SIS Status: •N/A, Linked 1, Linked 2, Linked 3 •Max 3 SIS can be linked.
6	• Selected customer name is displayed

3. Client Data Management

3.3 Profiles History – Create New Profile Popup



Description	
1	[Profile Name] Text Input: •Input Profile Name

3.3 Profiles History

Status

Client Data Management | Profiles History | English |

3 Profiles found | Create New Profile | Delete

Profile Name	Updated Date	Recommended Product	CFFF	FNA	SIS
New Profile	07-07-2014	N/A	N/A	N/A	N/A
For his son	01-07-2014	AmMetLife Protect 99	Completed	Linked 1	Linked 2
AMPRT	25-06-2014	AmCapital	N/A	N/A	Linked 1
ULLA5	11-06-2014	AmUni Education	N/A	Linked 1	Linked 1
New prospect	11-06-2013	N/A	incomplete	Linked 1	N/A

Back | 1 Customer Fact Find | 2 Financial Analysis | 3 Sales Illustration

Description	
1	[Customer Fact Find] Button: • If CFFF is N/A, go to create CFFF screen • In case CFFF status is Incomplete, Pending Signature, go to edit screen **• In case CFFF status is complete, user can view CFFF, SIS and FNA linked to the profile but can not modify.**
2	[Financial Analysis] Button: • If FNA is N/A, go to create FNA screen • In case more than 1 FNA is linked, display popup list
3	[Sales Illustration] Button: •If SIS is N/A, go to create SIS screen • In case more than 1 SIS is linked, display popup list

3. Client Data Management

3.3 Profiles History – FNA List Popup

Status

FNA List Popup ✕

Type	Information	Additional Capital Required	Created Date
Income Protection	Annual Income : 60000 RM, Years of Income Provision : 20 Years	RM 60,000	01-07-2014
Child Education	Child's Name : Peter, Age : 6 Years, Uni/College Entry Age : 18 Years	RM 300,000	01-07-2014
Child Education	Child's Name : James, Age : 2 Years, Uni/College Entry Age : 18 Years	RM 80,000	11-06-2014

1 Create New | Edit | Delete

Description	
*	Rank of order by created date
1	- If 3 FNA is existing, can not create new one. **- If the FNA is linked to completed CFFF, then "edit" button will be changed to "view" button to disable data modification.**

3. Client Data Management

3.3 Profiles History – SIS List Popup

Status

SIS List Popup

✕

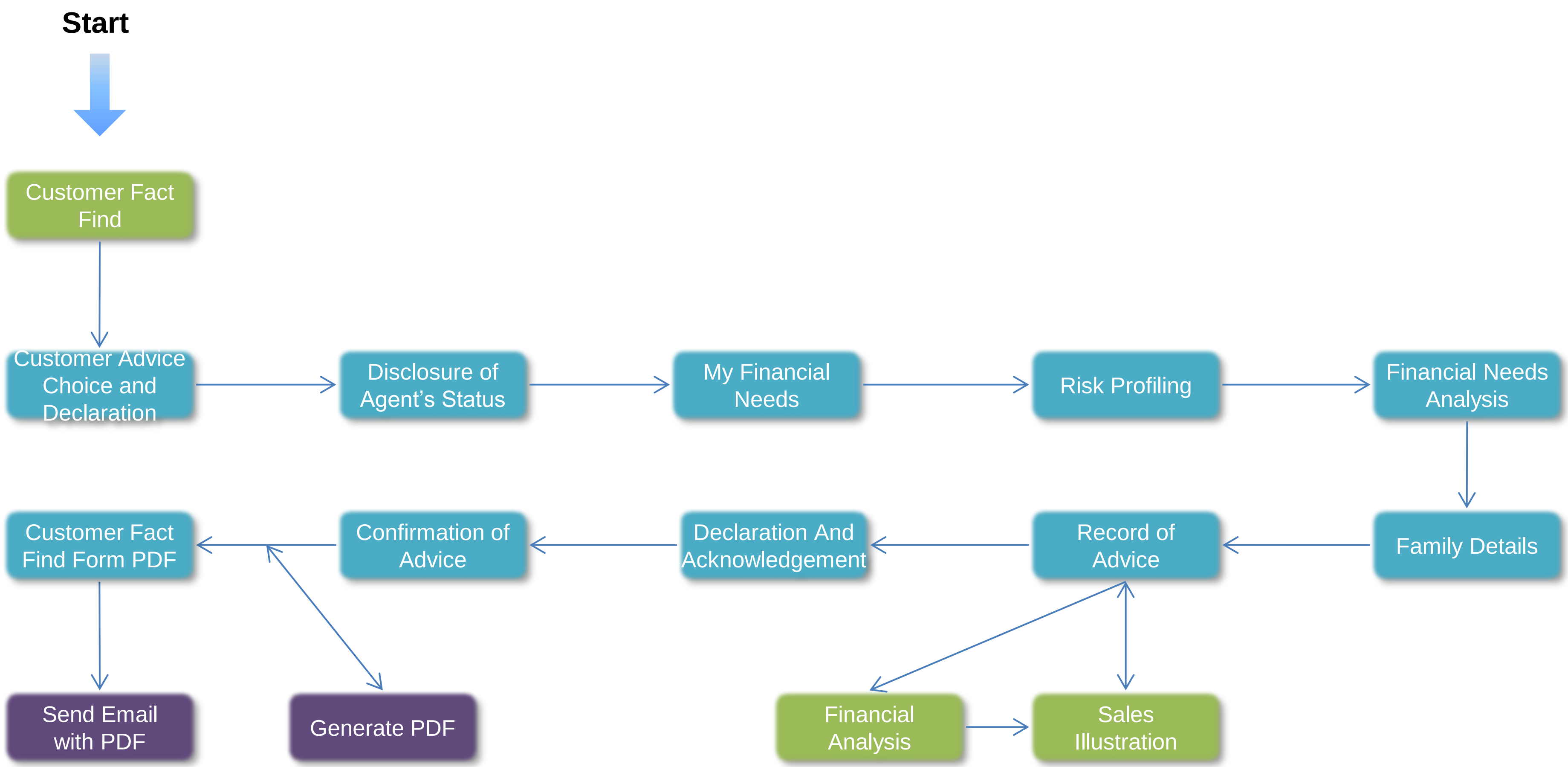
Plan Code	Plan Name	Life Assured Name	Life Assured ANB	Annual Premium (RM)	Sum Assured (RM)	Created Date
ULLA5	AmLifeStyle	Tony	50	50,000	3,000,000	01-07-2014
ULRP6	AmLink	Tony	50	70,000	5,000,000	01-07-2014
ULSP5	AmCapital	James	30	35,000	2,000,000	11-06-2014

1 **Create New** **Edit** **Delete**

Description	
*	Rank of order by created date
1	- If 3 SIS is existing, can not create new one. - If the SIS is linked to completed CFFF, then “edit” button will be changed to “view” button to disable data modification. - Reordering of SIS can only be done by selecting and modifying CFFF.

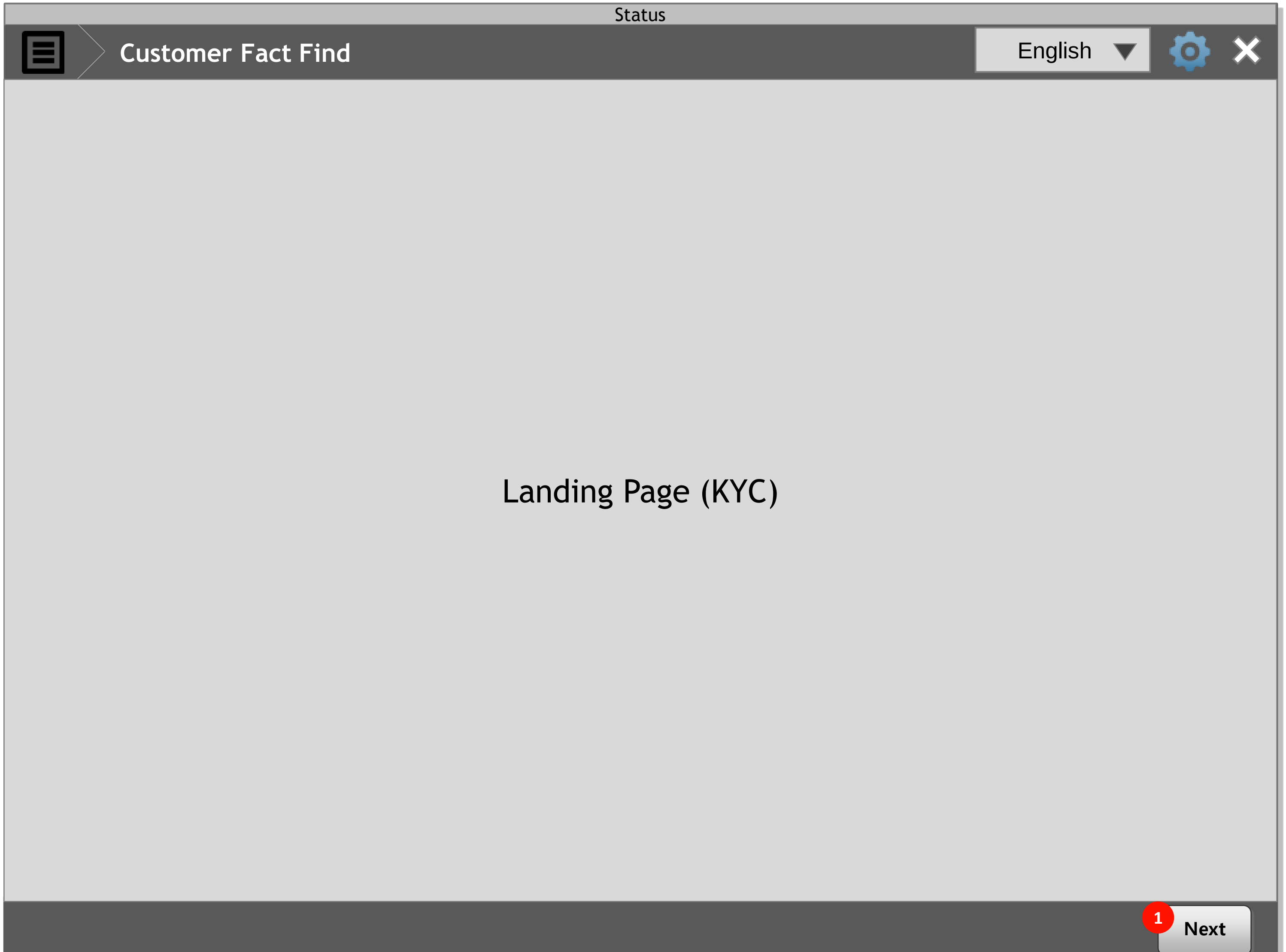
4. Customer Fact Find

4.Customer Fact Find



4. Customer Fact Finding

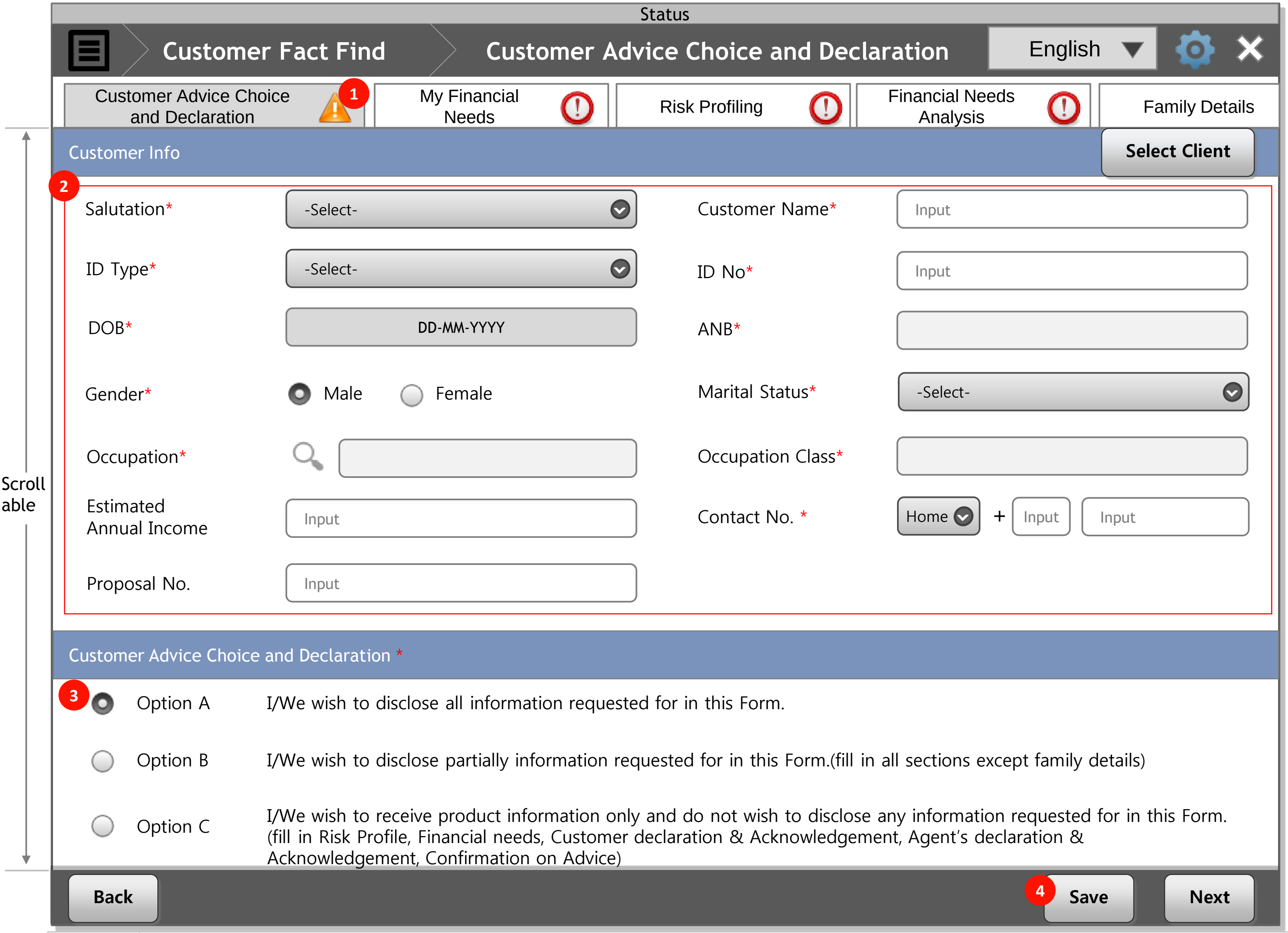
4.1 Customer Advice Choice and Declaration



Description	
1	Go to Customer Advice Choice and Declaration Tab

4. Customer Fact Finding

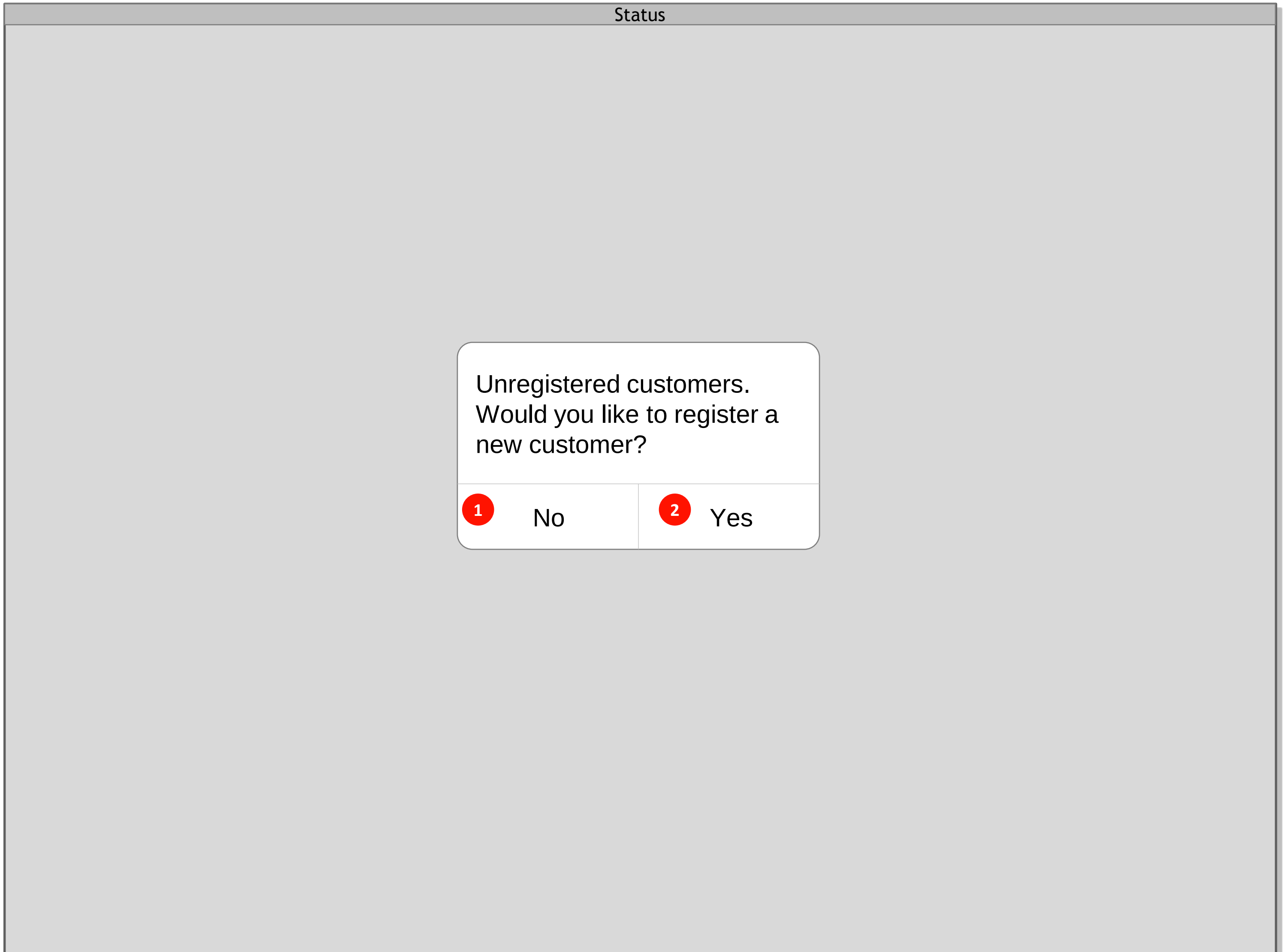
4.1 Customer Advice Choice and Declaration



	Description
*	Selected Client info is auto populated. If done on CM 1st then only come CFFF, relevant info will auto populated to CFFF, and required agent to fill in the rest of the info. Once agent click on save, the additional info key in will auto populated back to CM.
*	Mandatory field : Salutation, Customer Name, ID Type, ID No, DOB, ANB, Gender, Marital Status, Occupation, Occupation Class, Contract No
1	[Tab status] • : this tab is complete. • : this tab is filled in. • : this tab is not filled yet.
2	Selected client info is auto populated.
3	Depending on the option selected, Tab is shown or hide.
4	[Save] Button: • Save CFFF. In case there is profile, new profile is generated. •If not existing customer, ask if agent wants to save. Profile is only saved when the customer is registered in customer DB..

4. Customer Fact Finding

4.1 Customer Advice Choice and Declaration – Clicked Save Button

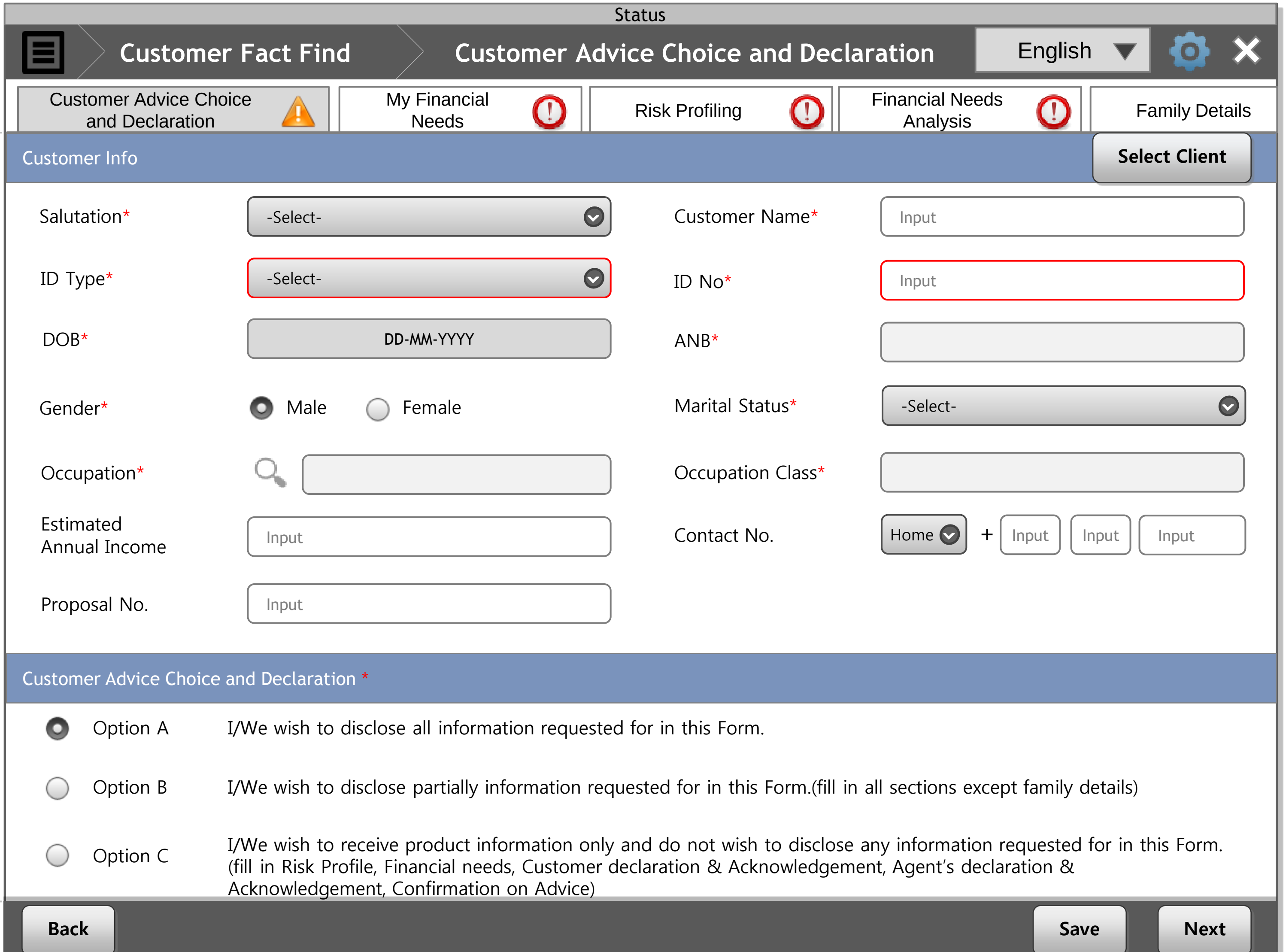


	Description
*	• Ask to register customer.
1	• If no, client is not registered and can not save profile, CFFF.
2	• If yes, client is registered and make new profile that linked to this CFFF.

4. Customer Fact Finding

4.1 Customer Advice Choice and Declaration

Scroll able



Description	
*	If mandatory field is not filled. that is highlighted as red border.

4. Customer Fact Finding

4.1 Customer Advice Choice and Declaration (if select option C)

Status

Message ✕

It is highly recommended for you to disclose as much information as you can so that you will receive the right solution

Description	
*	If select option C, display this message.

4. Customer Fact Finding

4.2 Disclosure of Agent's Status

Status

Customer Fact Find | Disclosure of Agent's Status | English ▼ | ✕

Customer Advice Choice and Declaration	Disclosure of Agent's Status	My Financial Needs	Risk Profiling	Financial Needs Analysis

Agent's Name (1) Input | Agent's Code (1) Input

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

(2)
- ☐ Term Insurance Products
- ☐ Endowment Insurance Products
- ☐ Whole Life Insurance Products
- ☐ Medical, Accident and Health Insurance Products
- ☐ Investment-Linked Insurance Products

I receive remuneration from AmLife 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.
* Your agent is required to preserve the confidentiality of information disclosed by you and restrict the use of such information only for the purpose of recommending life insurance product(s).
* You must ensure that important information regarding the policy is disclosed to you and that you understand that information. Where something is not clear, you should seek an explanation from the agent or AmLife.
* Before you make a decision to purchase any life insurance policy, you must satisfy yourself that the product(s) meets your insurance needs and resources.

Back | Save | Next

Description	
1	Personal Info is auto-populated and can be edited.
2	Term, Endowment, Whole Life, Medical 중 어느 하나를 선택하면 나머지 옵션도 선택됨.

4. Customer Fact Finding

4.3 My Financial Needs

Status

Customer Fact Find | My Financial Needs | English | ✕

Customer Advice Choice and Declaration | Disclosure of Agent's Status | My Financial Needs | Risk Profiling | Financial Needs Analysis

My financial needs	Already planned	To discuss	Priority (1=LOW; 5=HIGH)	Remarks*	
I need to protect myself & my family against the financial impact of death, disability and critical illness.	Yes No	Yes No	1 1	2 Select	3
I am looking for security during retirement.	Yes No	4 Yes No	2	Select	
I want to make provision for my children's education.	Yes No	Yes No	4	Select	
I am saving for a specific need.	Yes No	Yes No	3	Select	
I want to make lump-sum investment.	Yes No	Yes No	5	Others	Input

*Indicate under *remark column*, area not to be discussed and why, e.g.:"already planned", "review in future", "not important now" etc.

Back | Save | Next

Description	
*	Enter My Financial Needs information.
1	[Priority] Dropdown: •1, 2, 3, 4, 5 •No duplicate selection is allowed
2	[Remarks] Dropdown: •already planned , review in future, not important now , others
3	[Others] Text Input: •Default : disabled •If Remarks select others, this is enabled.
4	If select To discuss is Yes, Remarks dropdown is disabled.

4. Customer Fact Finding

4.4 Risk Profiling

Status

Customer Fact Find | Risk Profiling | English | ✕

Customer Advice Choice and Declaration	Disclosure of Agent's Status	My Financial Needs	Risk Profiling	Financial Needs Analysis

Scroll able

Statement	Option	Score	
I'm prepared to invest for	Only a year or two	1	2
	Up to 5 years	3	4
	More than 10 years	5	
I can accept	Very low risk & know that my capital is safe	1	2
	Some fluctuations in value	3	4
	A higher risk for the chance of a higher return	5	
My investment tolerance	No decline in the value of my investment	1	2
	I am moderately concerned about short term declines in value	3	4
	I accept that my investment values may go down in the short/medium term	5	
Expectation on my investment	I am not concerned about inflation	1	2
	At least keep pace with rate of inflation	3	4

Total score: 19 1

Based on my total score, my preference 1 is **High appetite**

Back | Save | Next

Description	
1	Select each score, those fields are auto filled in.

4. Customer Fact Finding

4.4 Risk Profiling

Status

Customer Fact Find > Risk Profiling | English ▼ | ✕

Customer Advice Choice and Declaration | Disclosure of Agent's Status | My Financial Needs | Risk Profiling | Financial Needs Analysis

Scroll able

Statement	Option	Score	
I can accept	Some fluctuations in value	3	4
	A higher risk for the chance of a higher return	5	
My investment tolerance	No decline in the value of my investment	1	2
	I am moderately concerned about short term declines in value	3	4
	I accept that my investment values may go down in the short/medium term	5	
Expectation on my investment	I am not concerned about inflation	1	2
	At least keep pace with rate of inflation	3	4
	Exceed the rate of inflation	5	
My knowledge and experience	I have little knowledge and experience in securities and financial products	1	2
	I have some knowledge and experience in securities and financial products	3	4
	I have significant knowledge and experience in a wide range of securities and financial products	5	

Total score: 19

Based on my total score, my preference is **High appetite**

Back | Save | 1 Next

Description	
*	[Next] Button : •If this CFFF is filled in after SIS is done, Check matching client's risk appetite and the funds allocation. •If not matching. Display Appetite Matching Error popup.

4. Customer Fact Finding

4.4 Risk Profiling - alert

Status

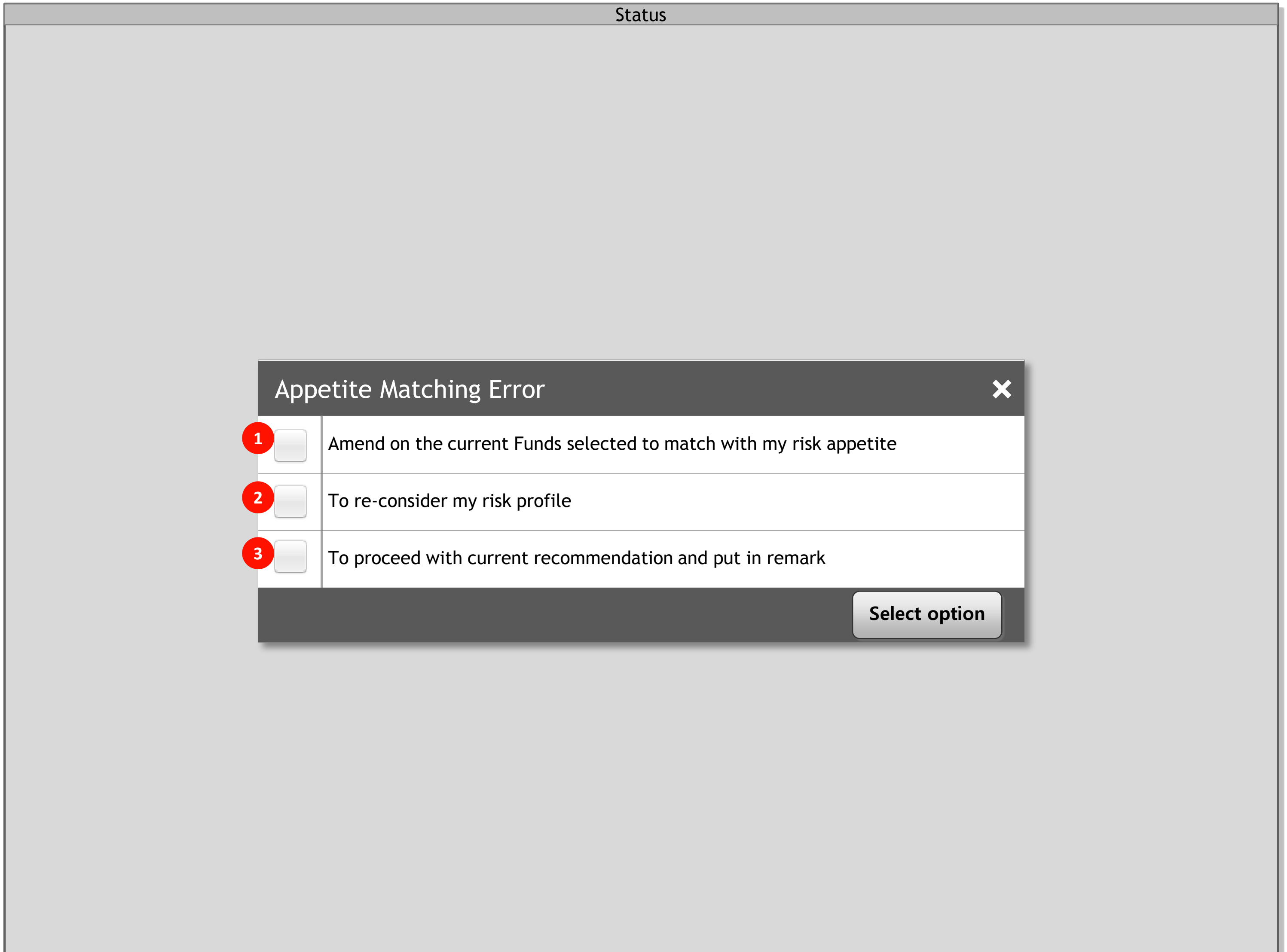
The funds allocation is not match with your risk appetite.

OK

Description	
*	If risk appetite is not matching, this message is show up.

4. Customer Fact Finding

4.4 Risk Profiling – Appetite Matching Error



Description	
*	You can choose one of three options.
1	Select this option, go to Sales Illustration Page to create new one.
2	You select risk profile again.
3	Go to next tab. Select this option, you should fill in Actions taken by customer if different from recommendations in Record of Advice tab.

4. Customer Fact Finding

4.5 Financial Needs Analysis

Status

Customer Fact Find | Financial Needs Analysis | English

Financial Needs Analysis	Family Details	Record of Advice	Declaration And Acknowledgement	Confirmation of Advice

Existing protection/retirement/education/savings plans

Number of Existing Plans 1 (1)

Policy #1	Policy #2	Policy #3	Policy #4

Policy Owner	Input	Life Assured*	Input
Company	Input	Type of Plan (2)	Select
Death Benefits*	Input	Disability Benefits	Input
Other Benefits / (H&S, Accidental, etc.)	Input	Annual Premium *	Input
Premium Type*	Select	Frequency	Select
Start Date / Policy Effective Date	DD-MM-YYYY	Maturity Date	DD-MM-YYYY
Projected Lump Sum At Maturity(RM)	Input	Affordability(%) (3)	

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

Protection	Retirement	Education	Savings	Investment

Back | Save | Next

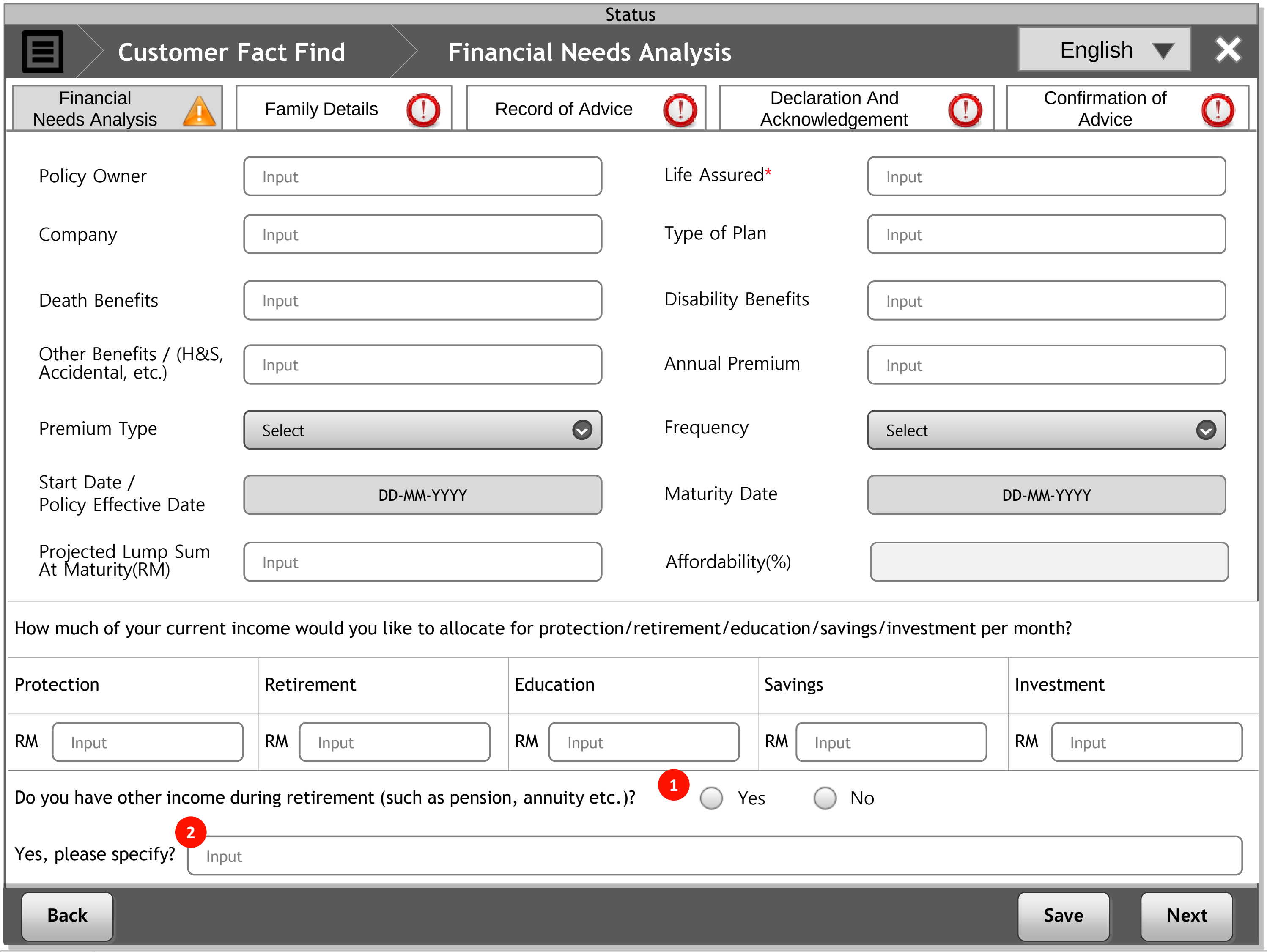
Scroll able

Description	
*	Max 4 existing plan information can be entered.
*	Mandatory field : Life Assured, Death Benefits, Premium Type, Annual Premium
1	[Number of Existing Plans] Dropdown •0, 1, 2, 3, 4 (max up to 4 policies) •Default : 0
2	[Type of plan] Dropdown: •Whole Life Non Par, Whole Life Par, Endowment Savings, Investment-Linked, Term Plan, Universal Life, ~~Fixed Benefit~~
3	[Affordability] Text input: •Disabled •Be auto calculated. (Annual Income / Annual Premium)
4	[Policy] Tabs: • Policy #5-#10 can be scrolled

4. Customer Fact Finding

4.5 Financial Needs Analysis

Scroll able



Description	
1	[Do you have other income during retirement (such as pension, annuity etc.)?] Radio: •Non mandatory •No need default selection
2	Text Input : •Do you have other income during retirement (such as pension, annuity etc.)? is Yes, this field is enabled.

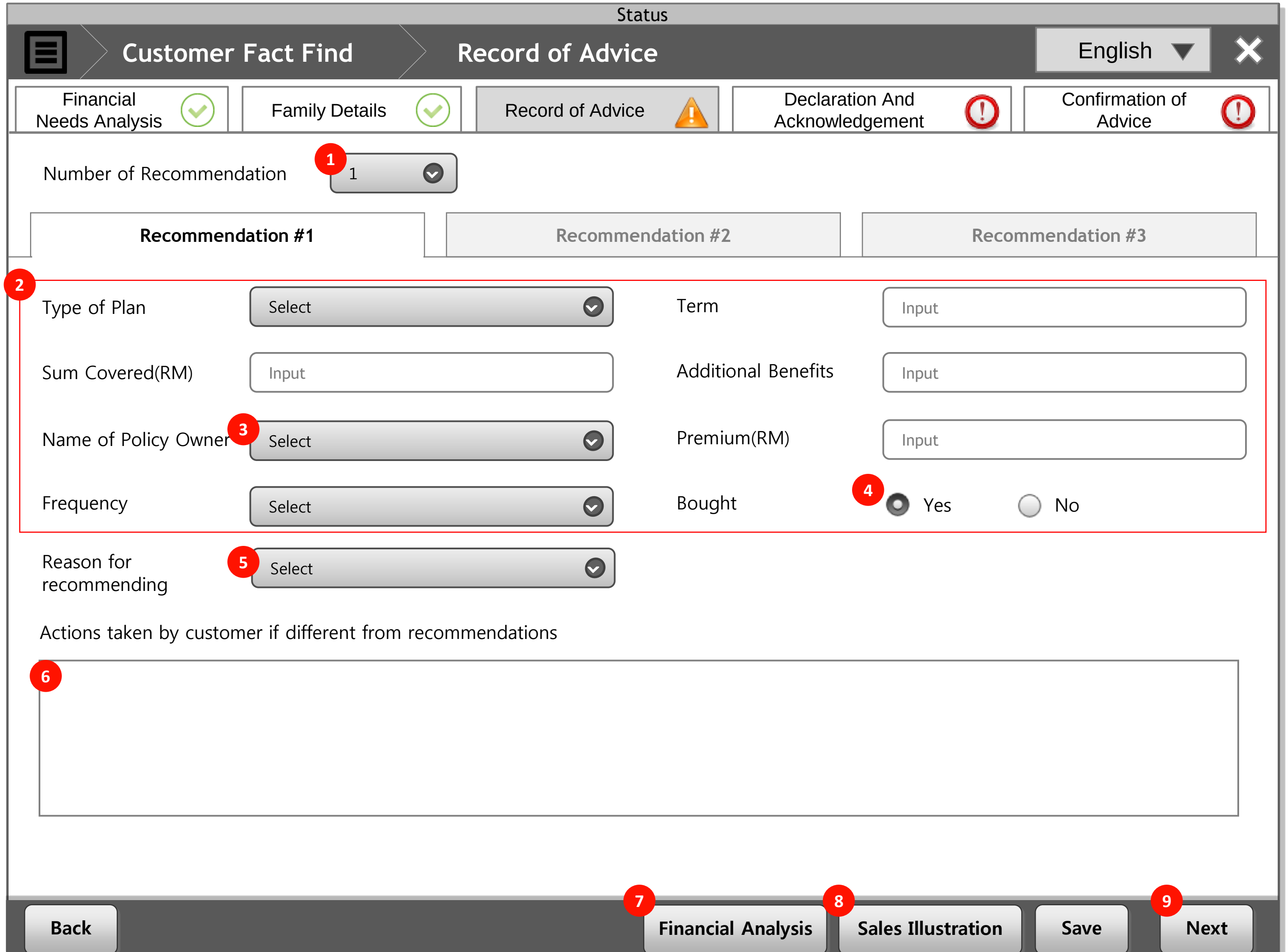
4. Customer Fact Finding

4.6 Family Details

Description	
*	Max 10 family information can be entered.
1	[Number of Family] Dropdown: •Default: 0 •0, 1, 2, 3, 4, 5, 6, 7, 8, 9, 10
2	[Family] Tabs: • User can scroll to enter more families • PDF will display up to 4 rows as default. (i.e. even if 1 family, will still show 4 rows) And if more families are added, they will be added in extra row. (i.e. 5 families will display 5 rows, 7 families will display 7 rows)

4. Customer Fact Finding

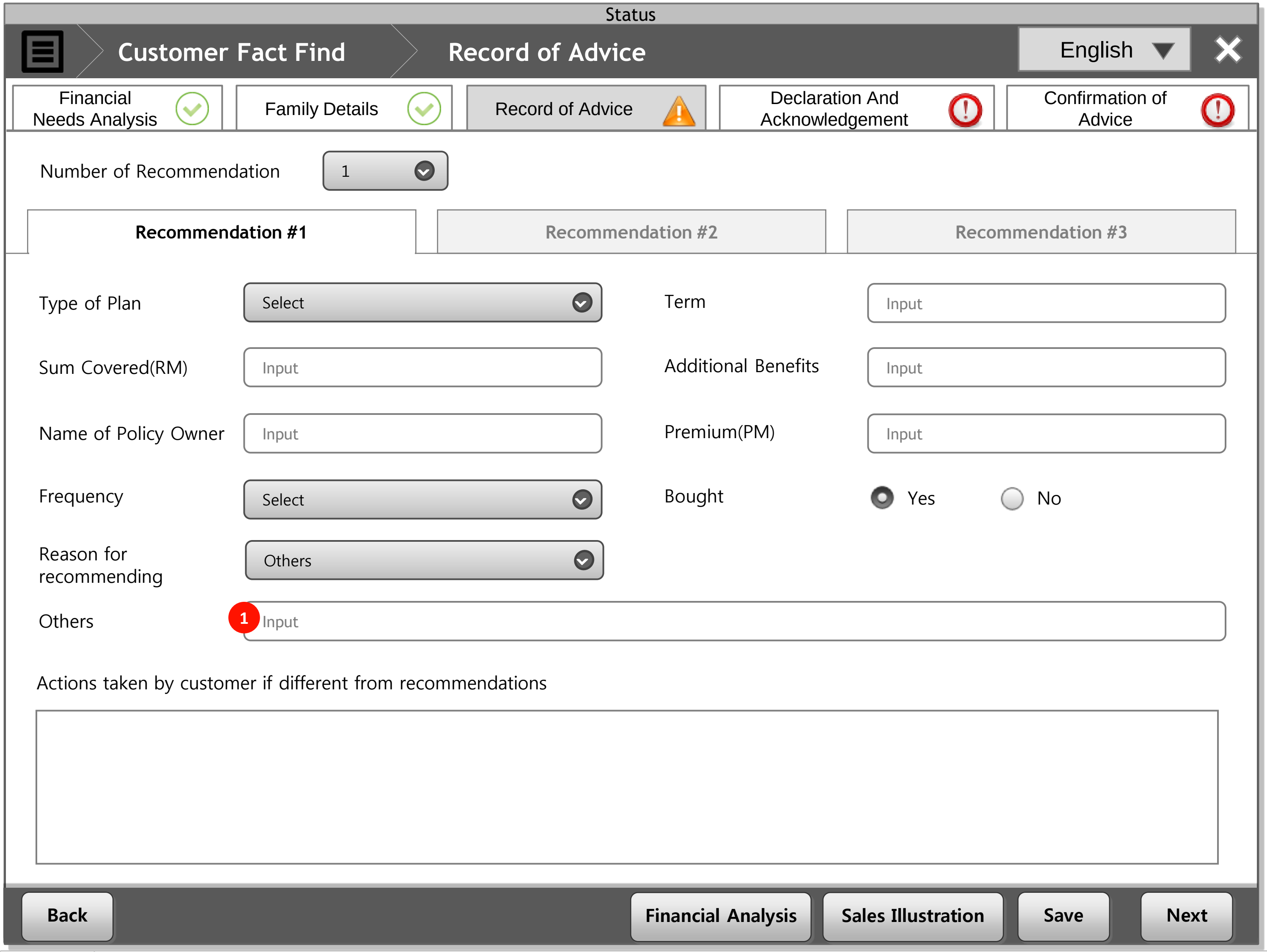
4.7 Record of Advice



Description	
*	Max 3 Recommendation can be entered.
1	[Number of Recommendation] Dropdown: •1/2/3
2	Completed SIS info is auto populated.
3	[Name of Policy Owner] Dropdown: •Dropdown list are Default: Yes
4	[Bought] Radio Box: •Default: Yes
5	[Reason for recommending] Dropdown: •Protection, Supplement retirement income, Child education, Saving for specific need, Lump Sum investment, Others •If select others, show free text input.
6	[Actions taken by customer if different from recommendations] Text Input: •If risk appetite is not match, this field must be filled in.
7	[Financial Analysis] Button: •Go to 'Financial Analysis' page
8	[Sales Illustration] Button: •Go to 'Sales Illustration' page •When back to this page, SIS info is auto populated in Recommendation fields. • In case no illustration is linked, go to create new illustration screen. • In case illustration is linked, display popup list."
9	[Next] Button: •Before go to next page, check on reason for recommending and top priority. •If reason for recommending and top priority not tally. Replace it by pop out message "Do you want to proceed with current recommendation? If yes please put in remark."

4. Customer Fact Finding

4.7 Record of Advice



Description	
*	If Reason for recommending select Others, this fields is shown.

4. Customer Fact Finding

4.7 Record of Advice – SIS List Popup

Status

SIS List Popup ✕

No	Plan Code	Plan Name	Life Assured Name	Life Assured ANB	Annual Premium (RM)	Sum Assured (RM)	Created Date
1	ULLA5	AmLifeStyle	Tony	50	50,000	3,000,000	01-07-2014
2	ULRP6	AmLink	Tony	50	70,000	5,000,000	01-07-2014
3	ULSP5	AmCapital	James	30	35,000	2,000,000	11-06-2014

Up | Down | Create New | Edit | Delete

Description	
1	SIS List with 3 existing SI can not create new one. One needs to be deleted.
2	[No] Column: •Shows recommendation number.
3	[Up] Button: •Move SI up for exchanging number.
4	[Down] Button: •Move SI down.

4. Customer Fact Finding

4.7 Record of Advice – Validation check, if appetite is not matching.

Status

The funds allocation is not match with your risk appetite. You must fill in Actions taken by customer if different from recommendations.

OK

Description	
*	If risk appetite is not matching with fund allocation, check validation for 'Actions taken by customer if different from recommendations' field. It must be filled in.

4. Customer Fact Finding

4.8 Declaration And Acknowledgement

Status

Customer Fact Find | Declaration And Acknowledgement | English

Financial Needs Analysis | Family Details | Record of Advice | Declaration And Acknowledgement | Confirmation of Advice

Customer

I/We acknowledge that the agent has advised me/us in accordance with this Customer Fact Find Form that clearly shows the products that I/we have chosen.

1

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 : 01/07/2014

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 advise 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.

Back | Save | Next

Scroll able

Description	
1	Customer must check both box.

4. Customer Fact Finding

4.8 Declaration And Acknowledgement

Status

Customer Fact Find | Declaration And Acknowledgement | English

Financial Needs Analysis | Family Details | Record of Advice | Declaration And Acknowledgement | Confirmation of Advice

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 advise 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.

2

Name of Agent : Tony

Date : 01/07/2014

1

Name of Leader : Input

Agent's status

One (1) Years and below

Above one (1) Years

Scroll able

Back

Save

Next

Description	
1	[Name of Leader] Text Input: •If agent's status is One Years and below, it is shown.
2	[Name of Agent]: •Agent Name auto populated from agent's status tab

4. Customer Fact Finding

4.8 Declaration And Acknowledgement

Status

Customer Fact Find | Declaration And Acknowledgement | English

Financial Needs Analysis	Family Details	Record of Advice	Declaration And Acknowledgement	Confirmation of Advice

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 advise 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.

Name of Agent : Tony

Date : 01/07/2014

Agent's status

- [ ] One (1) Years and below
- [x] Above one (1) Years

Back | Save | Next

Scroll able

Description

4. Customer Fact Finding

4.9 Confirmation of Advice

Status

Customer Fact Find | Declaration And Acknowledgement | English

Financial Needs Analysis	Family Details	Record of Advice	Declaration And Acknowledgement	Confirmation of Advice

Customer's Name 1 | Proposal No. 2

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.
3	Planning for security during retirement.
4	Making provision for your children's education.
2	Saving for a specific need.
5	Making a lump-sum investment.

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

3

Life Assured	Product Type	Term	Premium	Frequency	Sum Assured (RM)	Additional Coverage	Bought?
Brian	AmLifestyle	69	4500	Yearly	600000	ABB+	Yes
Phillip	AmLink	55	3000	Monthly	200000	HBR+	Yes

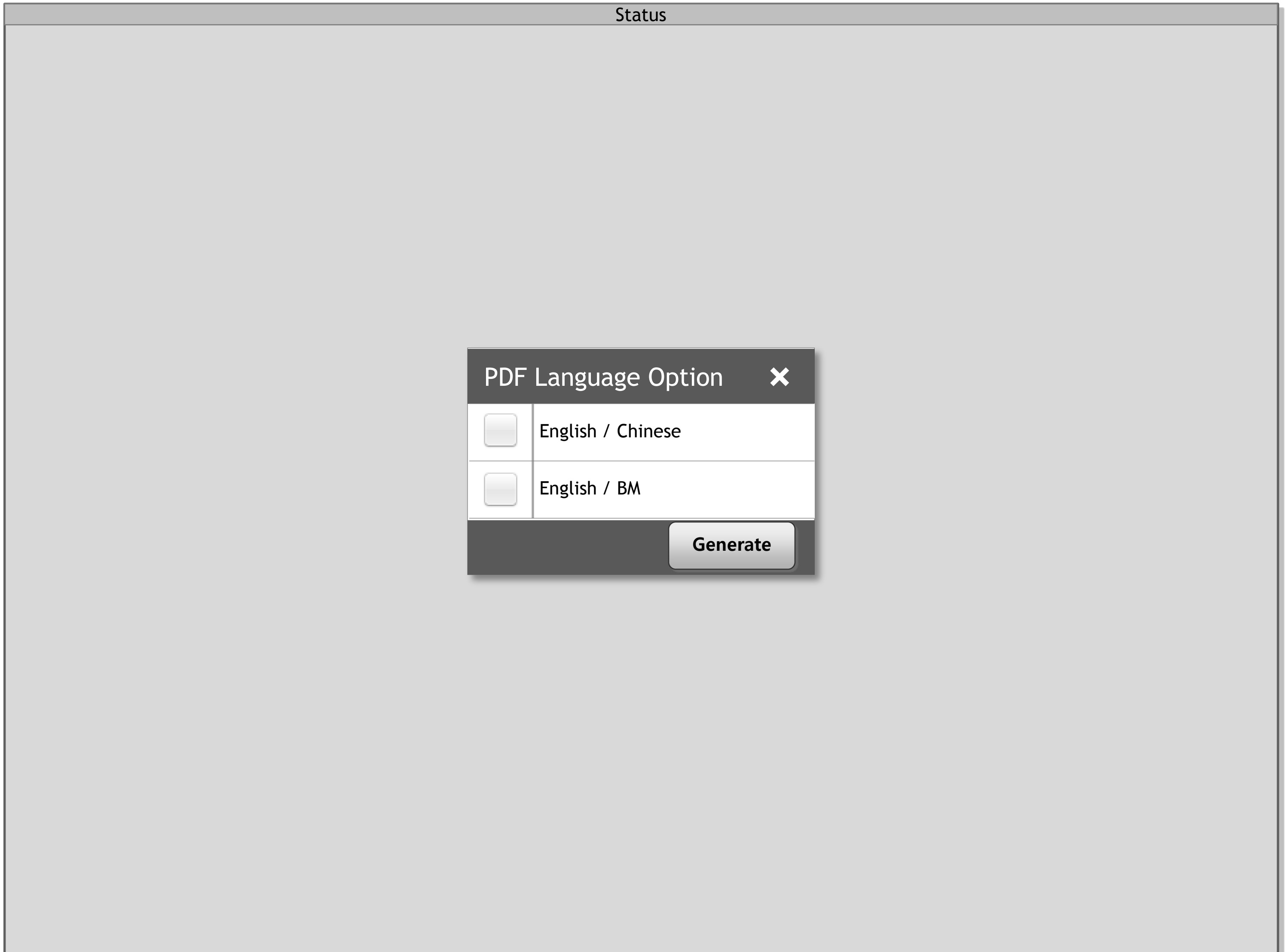
Notes :
You may cancel your life insurance policy by returning the policy document to AmLife Insurance Berhad within fifteen (15) calendar days after you receive it. The statement should be attached with the insurance policy contract and a copy will be kept by AmLife Insurance Berhad and the agent.

Back | Save | 4 Generate PDF

	Description
1	[Customer's Name] Text Input: •Disabled. •Value is auto populated from Customer Advice Choice and Declaration tab.
2	[Proposal No] Text Input: Proposal number allow to input. 1. Either auto populated from customer advice choice 2. Or input in confirmation of advice then auto populated to customer advice chose 3. Or leave it empty until agent print out and manually write the proposal no.
3	Shows recommendation product.
4	[Generate PDF] Button:

4. Customer Fact Finding

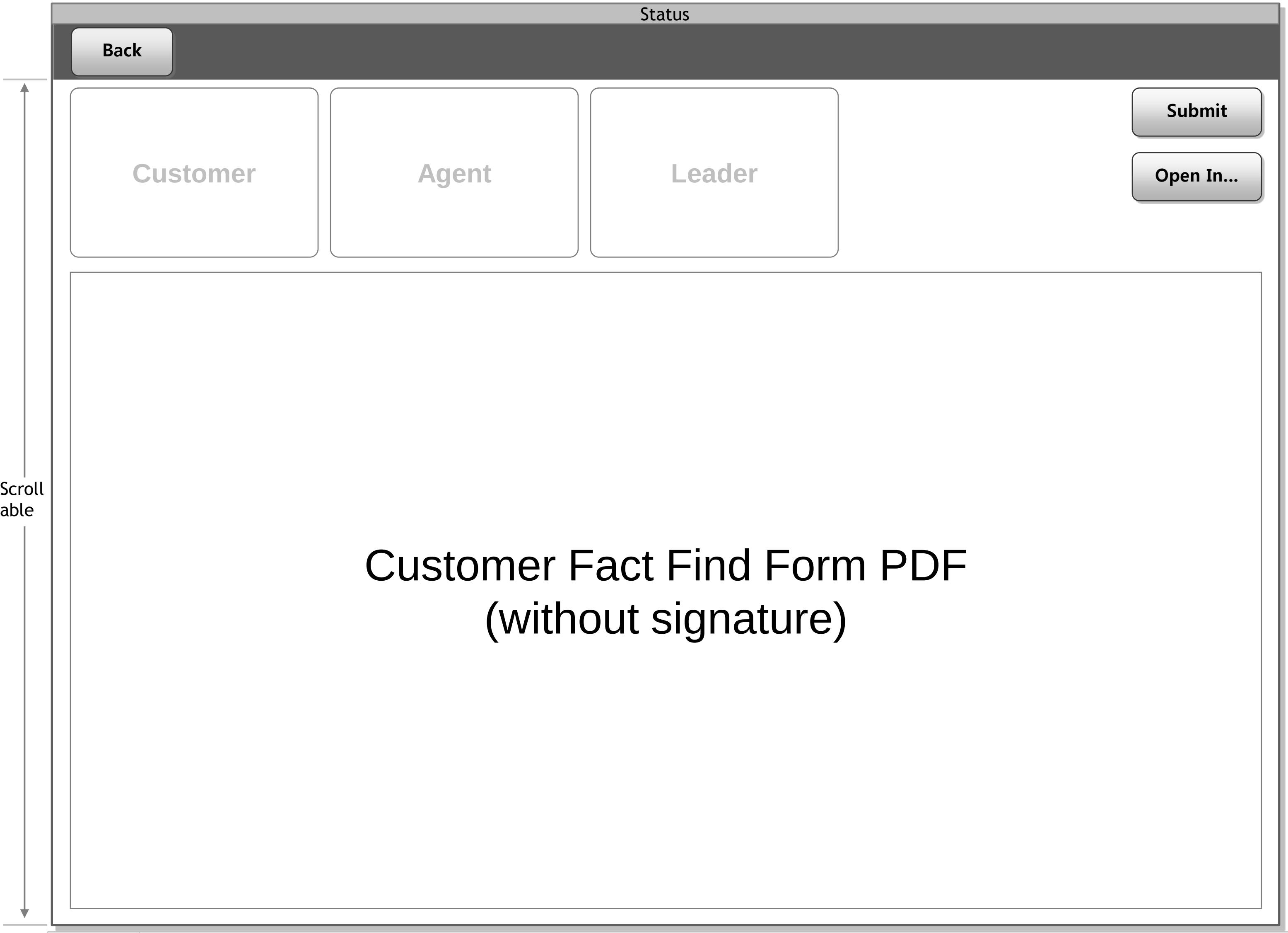
4.9 Confirmation of Advice



Description
Two language option.

4. Customer Fact Finding

4.10 Customer Fact Find Form PDF – Signature page



Description	
*	Similar to MetLife Hong Kong and India tab. After sending the signatures, embedded signature PDF is generated.

4. Customer Fact Finding

4.10 Customer Fact Find Form PDF – Embedded signature

Status

Back

Open In..

Scroll able

Customer Fact Find Form PDF
(embedded signature)

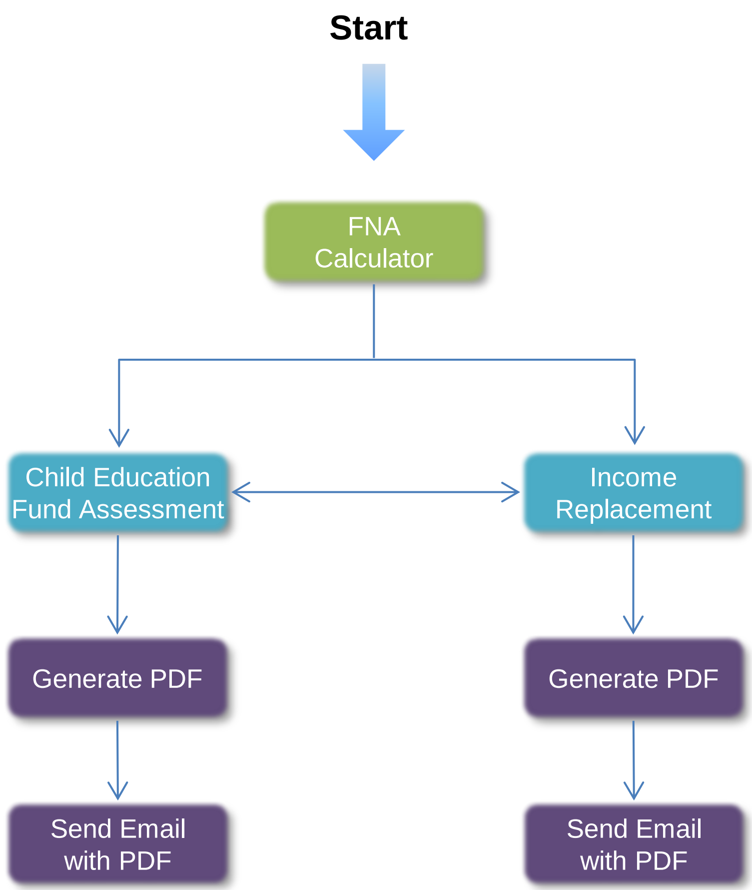
	Description
*	Equivalent to the existing project screen. Able to send generated PDF via email.

5. Financial Analysis

MetLife

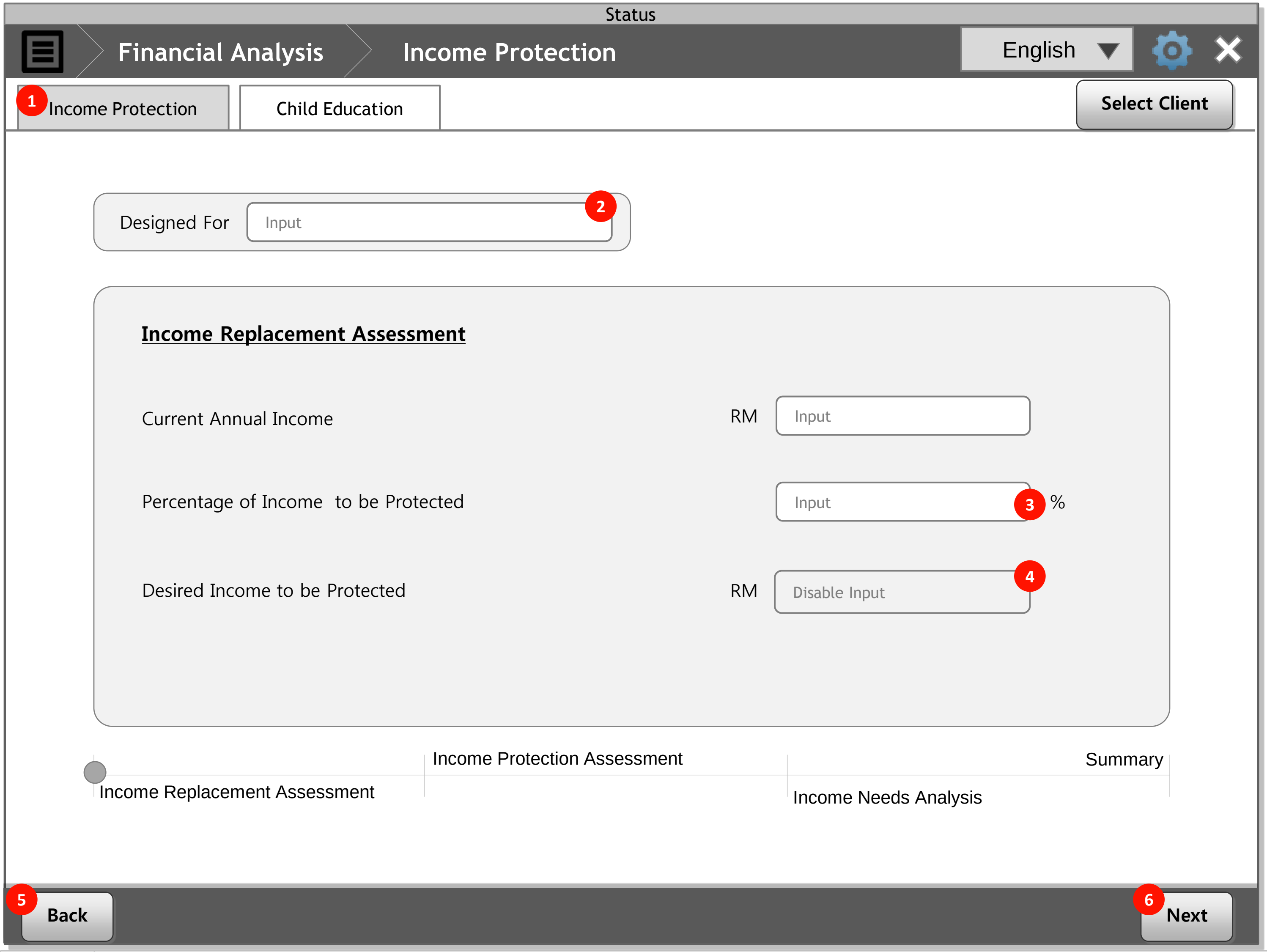
SK C&C

5.Financial Analysis



5. Financial Analysis

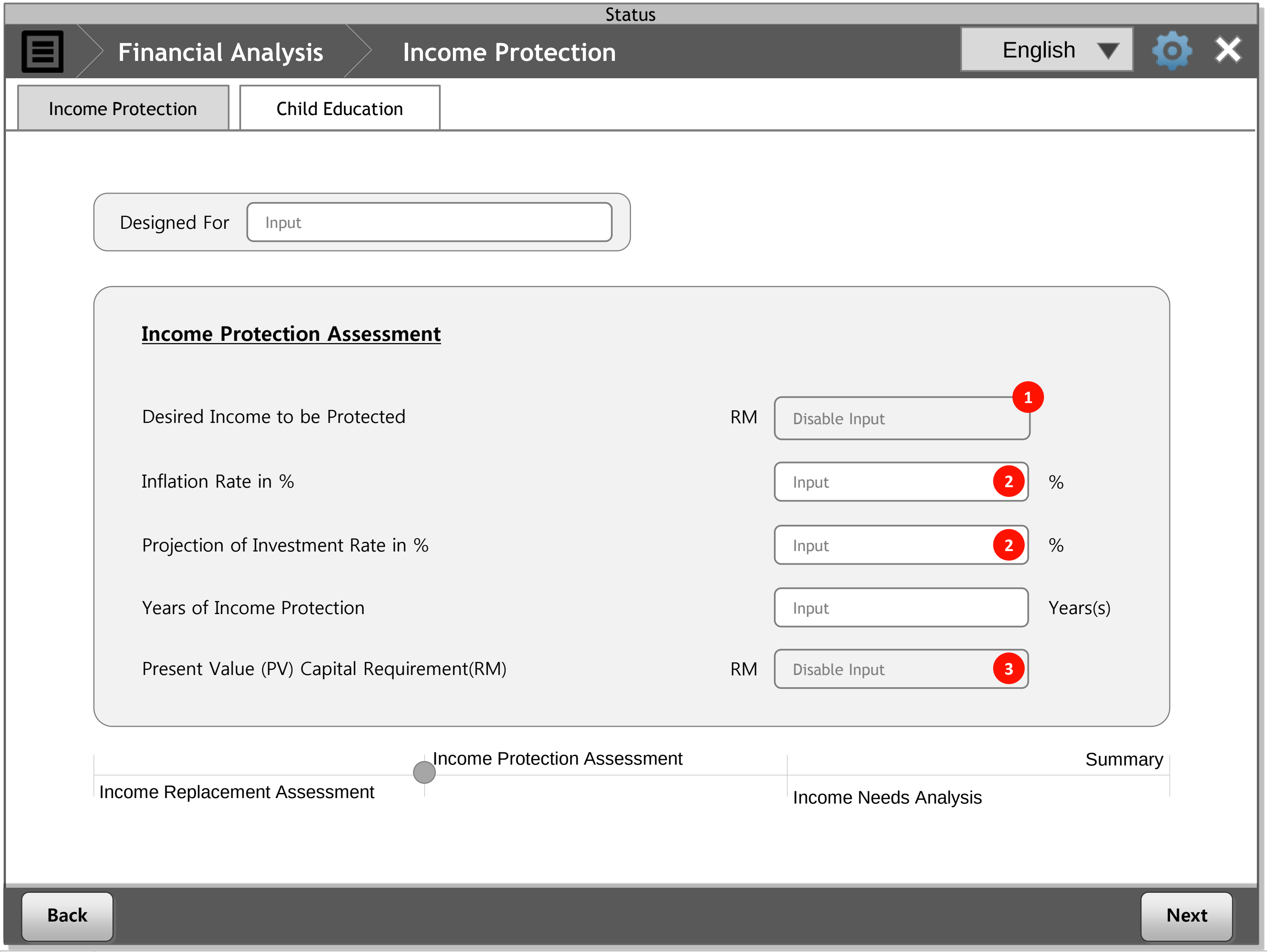
5.1 Income Protection



Description	
1	[Income Protection] Tab
2	[Designed For] Text Input: • If entering from Profile history or CFFF, auto-populate client name and disable data modification. • In case entering from main menu, data can be modified.
3	[Percentage of Income to be Protected] Text Input: • Can enter up to 1 decimal place
4	[Desired Income to be Protected] Text input: • The value is auto populated.
5	[Back] Button • Back to previous page or step.
6	[Next] Button • Go to next step.

5. Financial Analysis

5.1 Income Protection



Description	
1	[Desired Income to be Protected] Text Input: • Value entered in previous step is displayed. Can not be modified
2	• Percentage text input can enter up to 1 decimal point
3	[Present Value (PV) Capital Requirement(RM)] Text input: • This value is auto populated.

5. Financial Analysis

5.1 Income Protection

Status

Financial Analysis > Income Protection | English ▼

Income Protection | Child Education

Designed For: Input

Income Needs Analysis

Capital Required to Fund Income Needs RM [Disable Input] 1

Existing Funds Available to Fund Income Needs RM [Input]

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

Additional Capital Required to Fund Income Needs RM [Disable Input] 1

*if the value is negative, no additional fund is required.

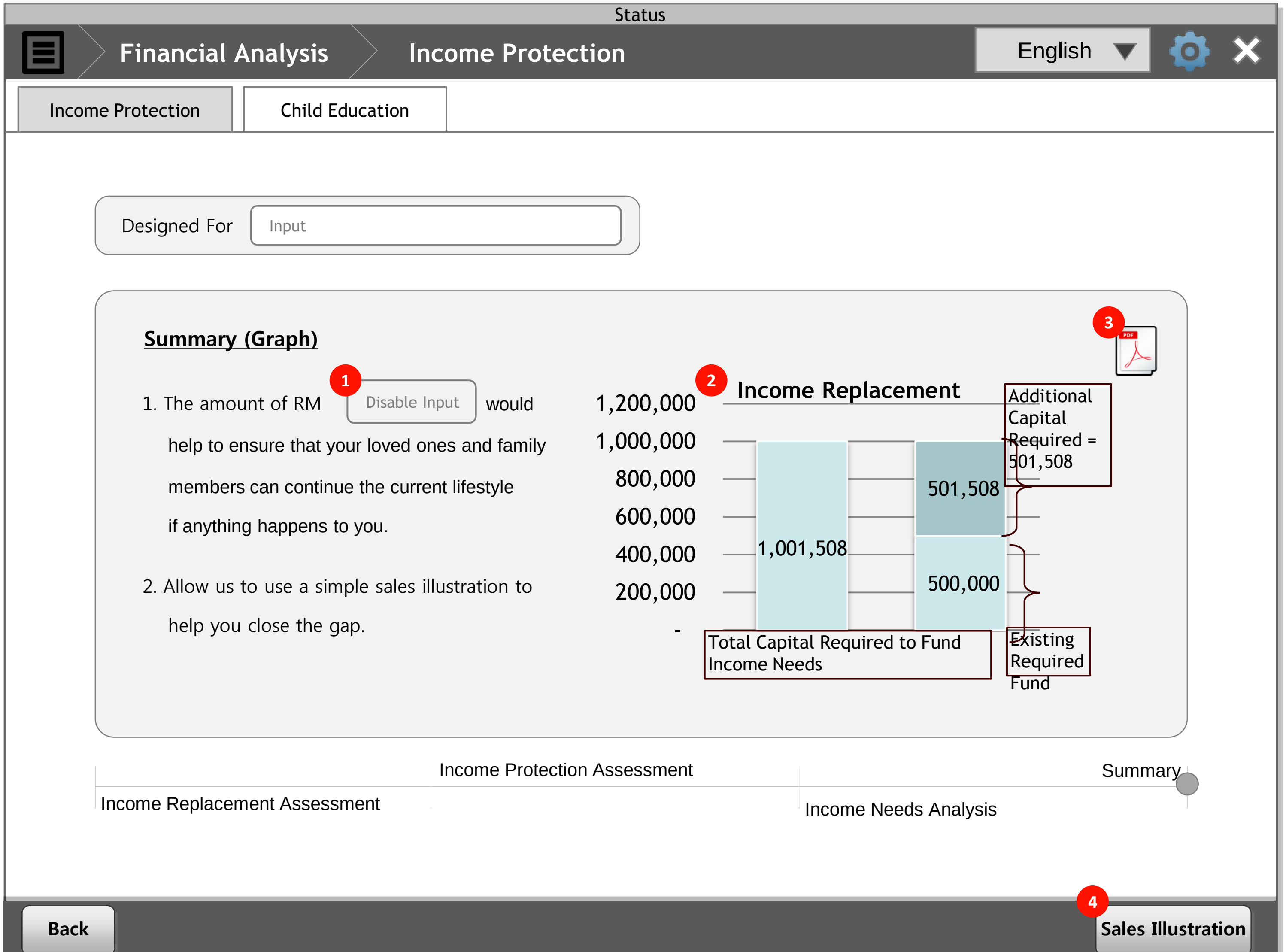
Income Replacement Assessment — Income Protection Assessment — Income Needs Analysis — Summary

Back | Next

	Description
1	• This value is auto populated.

5. Financial Analysis

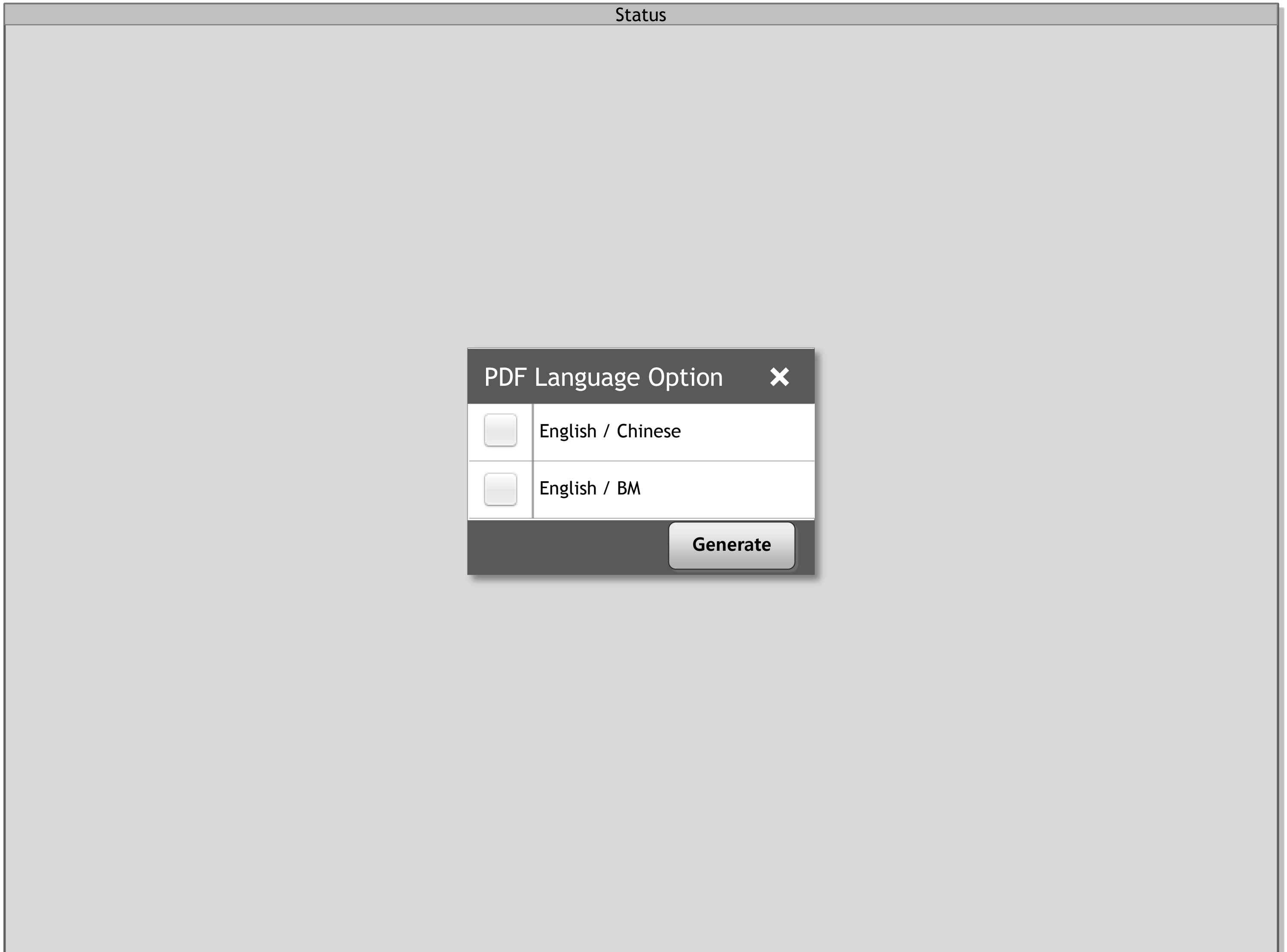
5.1 Income Protection



Description	
1	• This value is auto populated.
2	[Graph] Area
3	[PDF] Button: • Go to PDF view screen after FNA PDF generation • In case customer not an existing customer, prompt user if they want to save the customer. • PDF language selection screen is displayed.
4	[Sales Illustration] • Go to Sales Illustration screen. • Only enabled after checking PDF.

5. Financial Analysis

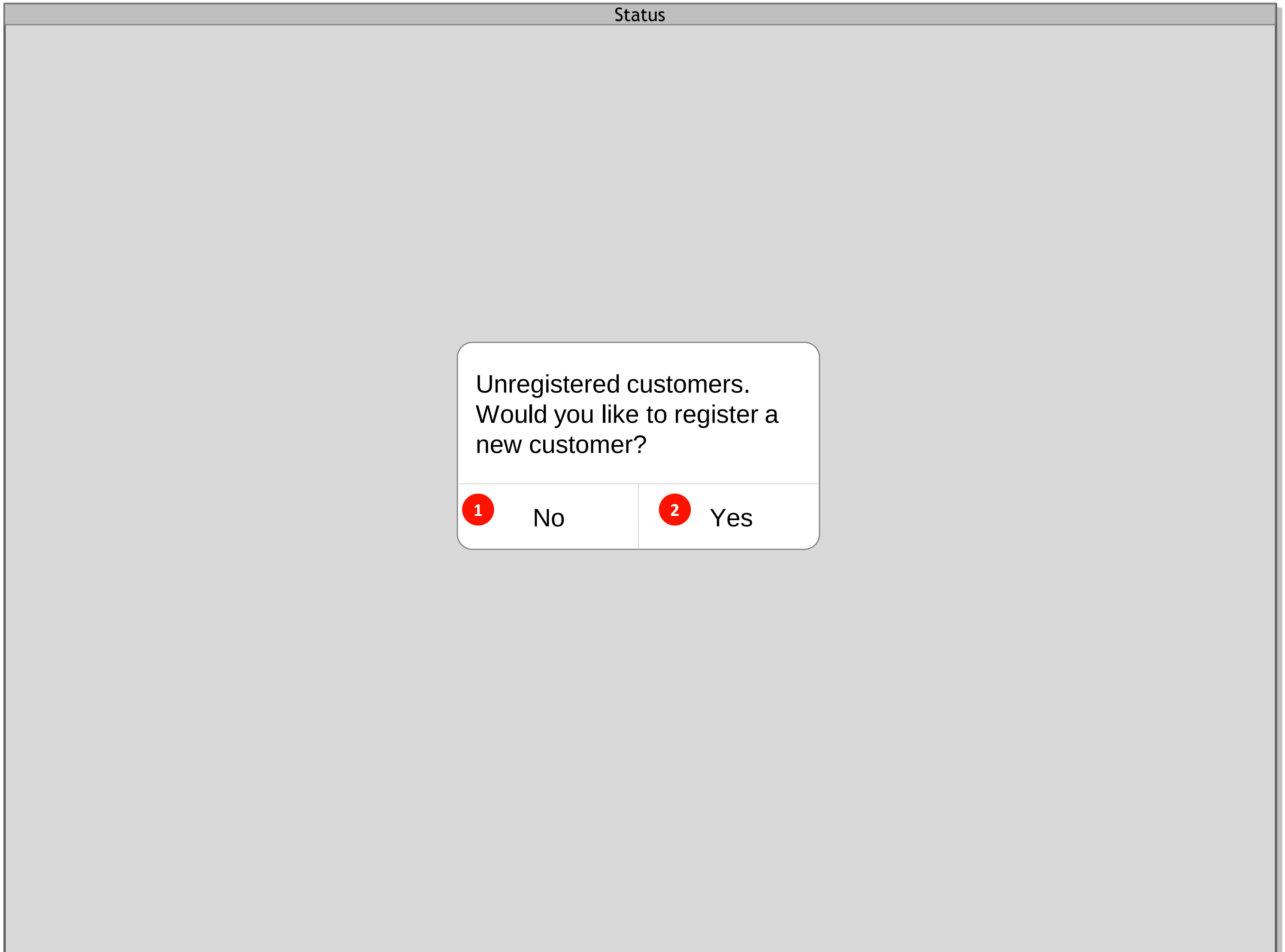
5.1 Income Protection – Select Language Option for Generate PDF



Description	
	Two language option.

5. Financial Analysis

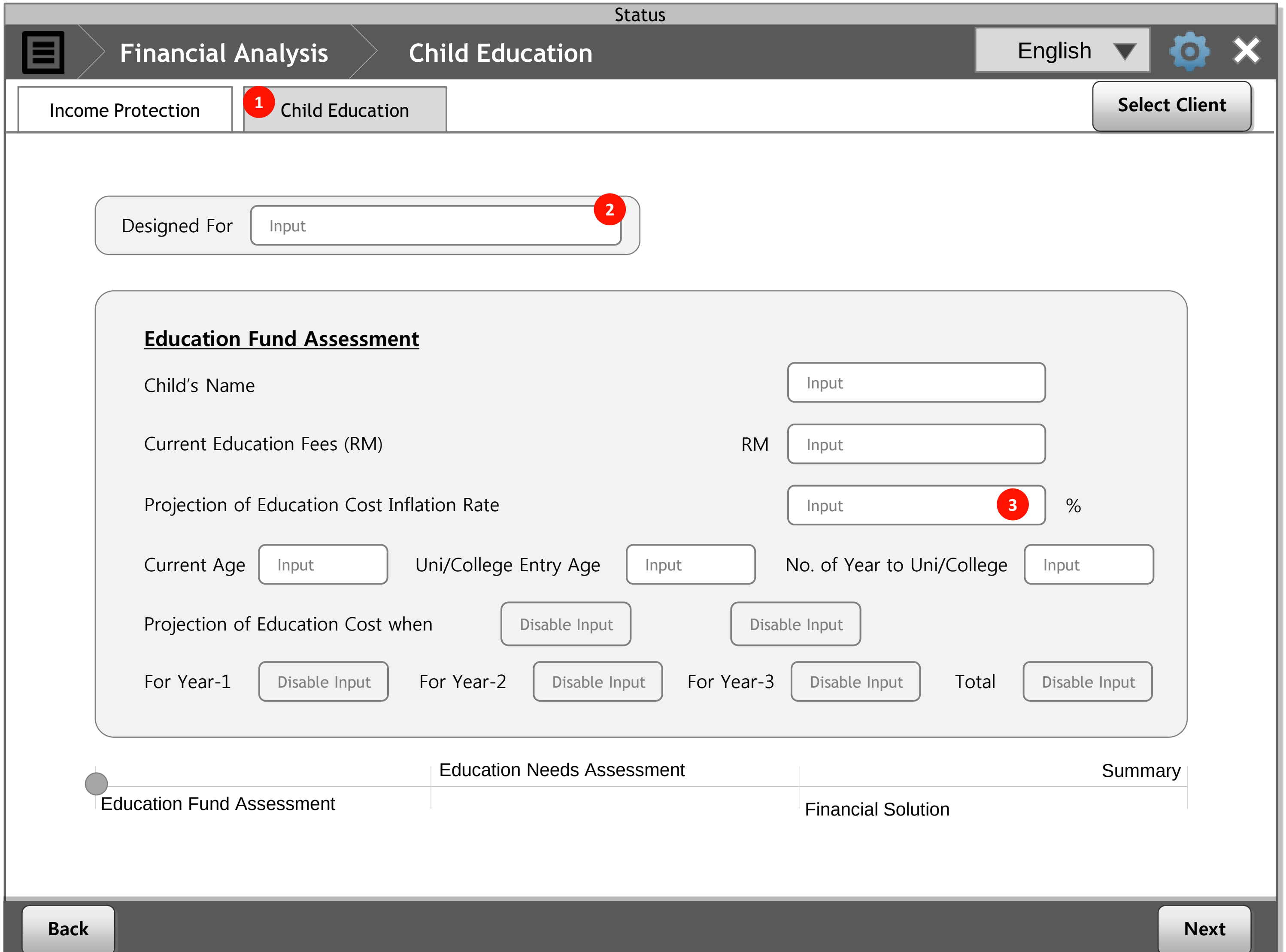
5.1 Income Protection



Description	
*	• Ask to register customer.
1	• If no, client is not registered and can go to SIS.
2	• If yes, go to New Client screen of Client Data Management Module.

5. Financial Analysis

5.2 Child Education



Description	
1	[Child Education] Tab
2	[Designed For] Text Input: • If entering from Profile history or CFFF, auto-populate client name and disable data modification. • In case entering from main menu, data can be modified.
3	• Can enter up to 1 decimal place

5. Financial Analysis

5.2 Child Education

Status

Financial Analysis > Child Education | English ▼

Income Protection | Child Education

Designed For [Input]

Education Needs Assessment

Existing Saving And Investable Available Assests for Education Funding : RM [Input]

Yield [Input] 1 %

Future Yearly Savings and Investment for [ ] until [ ] age : RM [Input]

Yield [Input] 1 %

Projection of Total Savings and Investable Assets for [ ] at [ ] age : RM [Disable Input]

Additional Fund Required for Education Funding for [ ] at [ ] age : RM [Disable Input]

*if the value is negative, no additional fund is required.

Education Needs Assessment | Summary

Education Fund Assessment | Financial Solution

Back | Next

	Description
1	• Can enter up to 1 decimal place

5. Financial Analysis

5.2 Child Education

Status

Financial Analysis > Child Education

English

Income Protection | Child Education

Designed For [Input]

Financial Solution

Projection of investment return (%) [Input] %

Option A Yearly Investment required RM [Disable Input]

Option B Monthly Investment required RM [Disable Input]

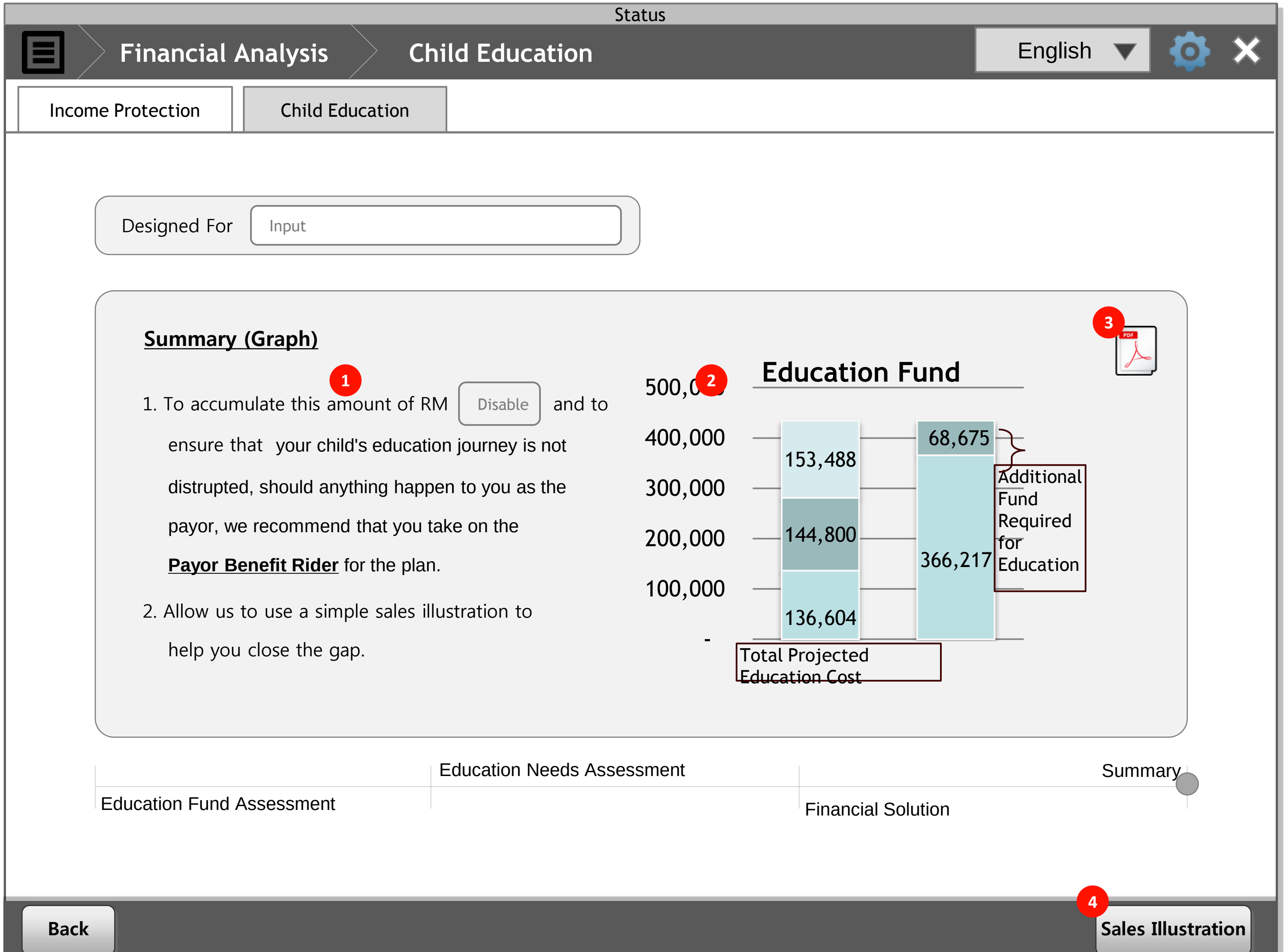
Education Fund Assessment — Education Needs Assessment — Financial Solution — Summary

Back | Next

Description
*

5. Financial Analysis

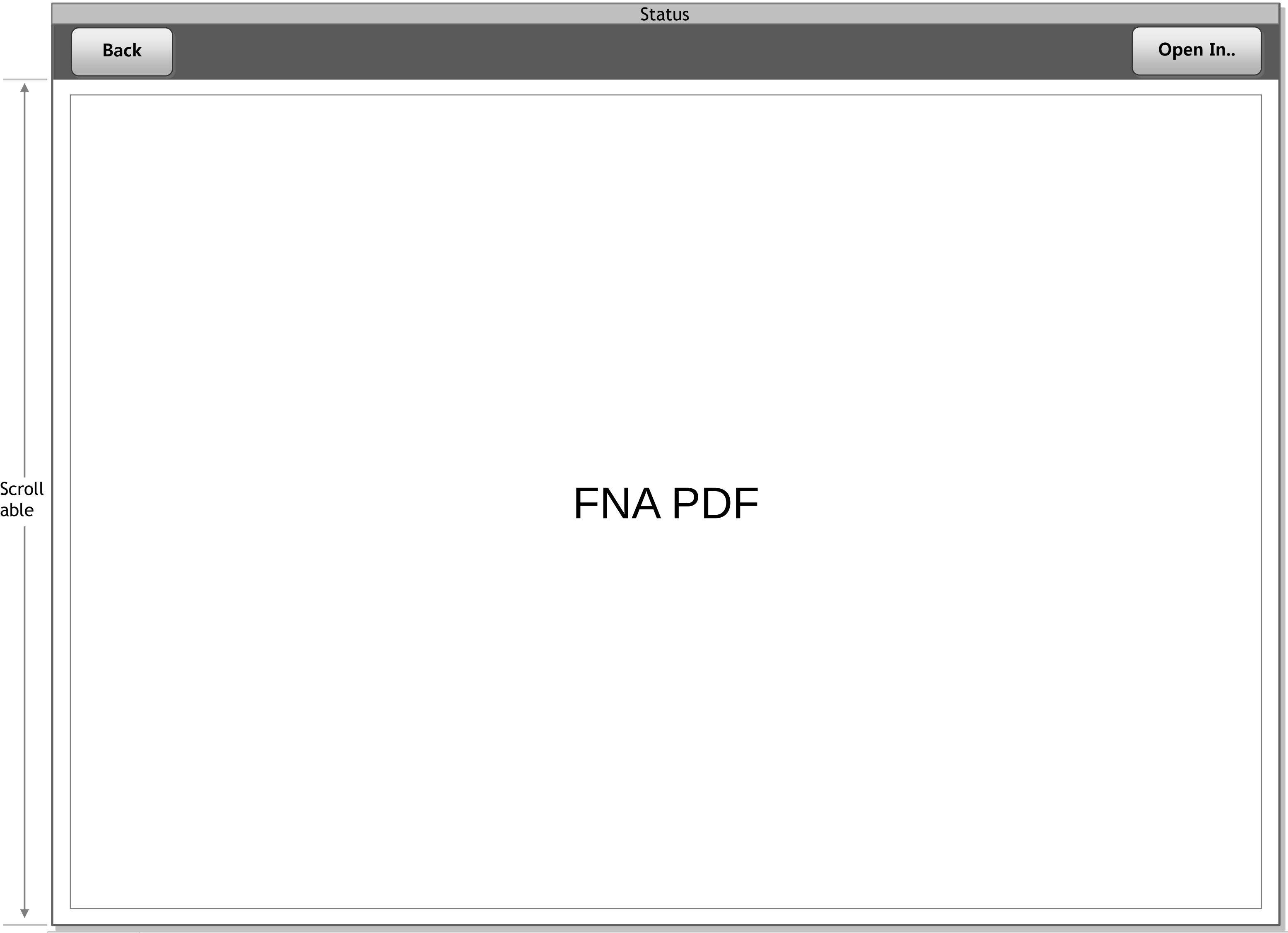
5.2 Child Education



	Description
1	• This value is auto populated.
2	[Graph] Area
3	[PDF] Button: • Go to PDF view screen after FNA PDF generation • In case customer not an existing customer, prompt user if they want to save the customer. • PDF language selection screen is displayed.
4	[Sales Illustration] • Go to Sales Illustration screen. • Only enabled after checking PDF.

5. Financial Analysis

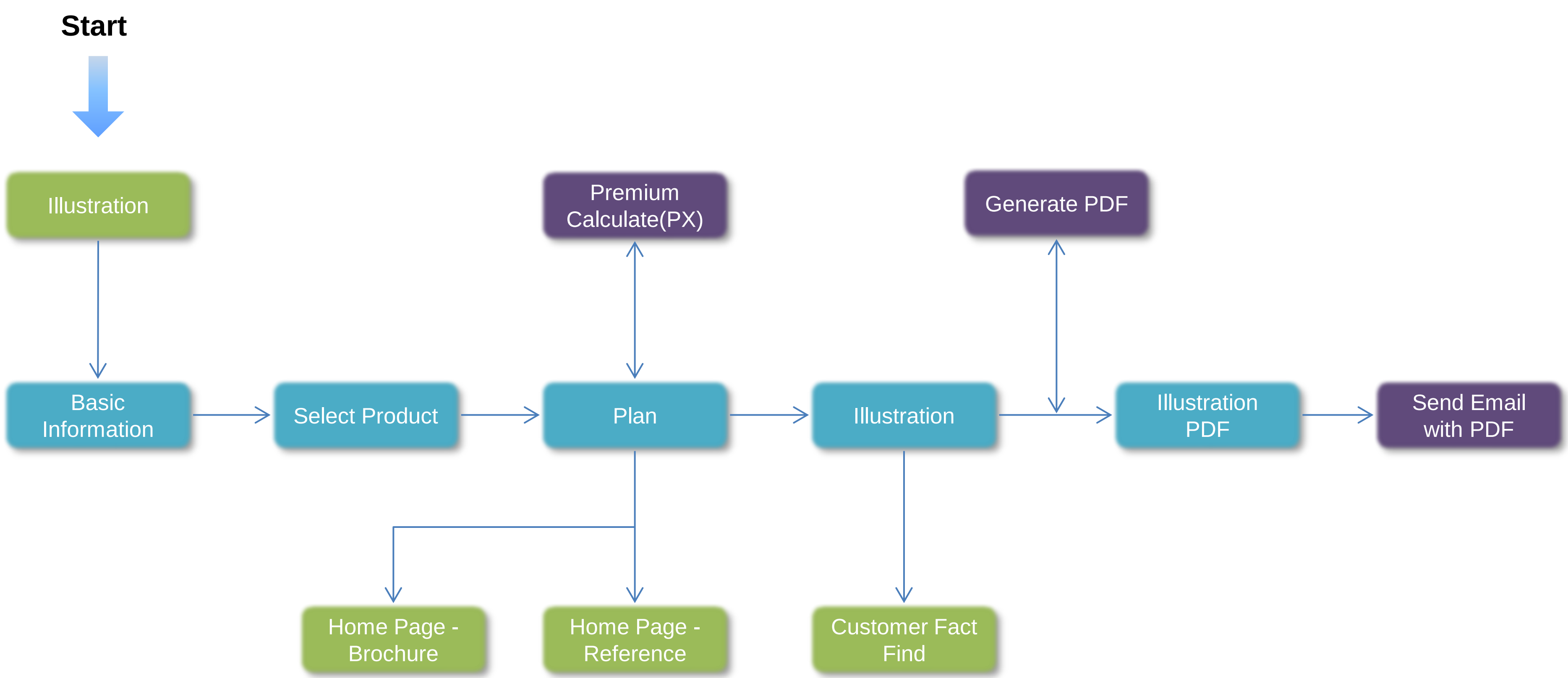
5.3 FNA PDF



Description	
*	PDF is used to view FNA results. Able to send FNA results via email.

6. Sales Illustration

6.Sales Illustration

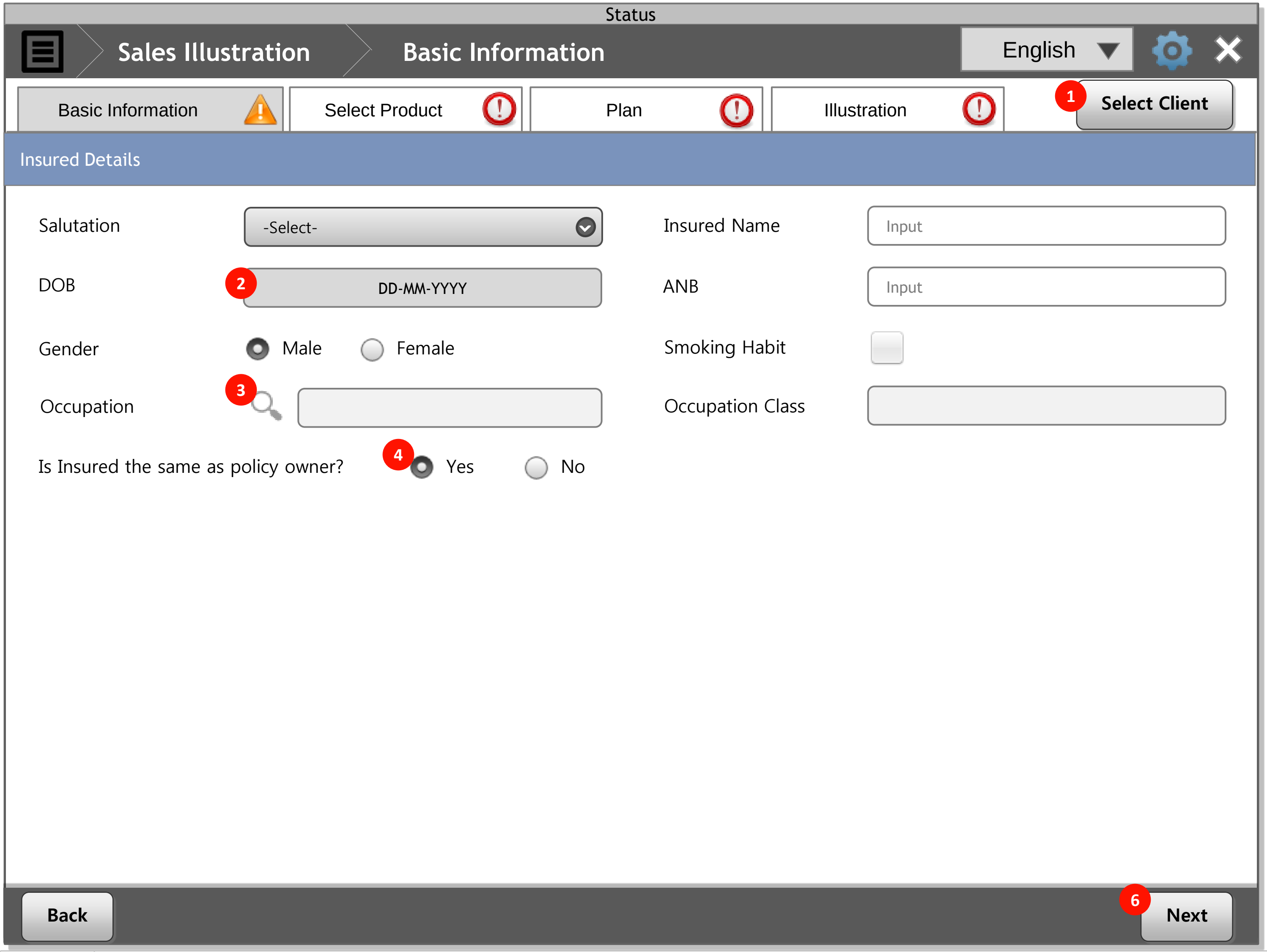


MetLife

SK C&C

6. Sales Illustration

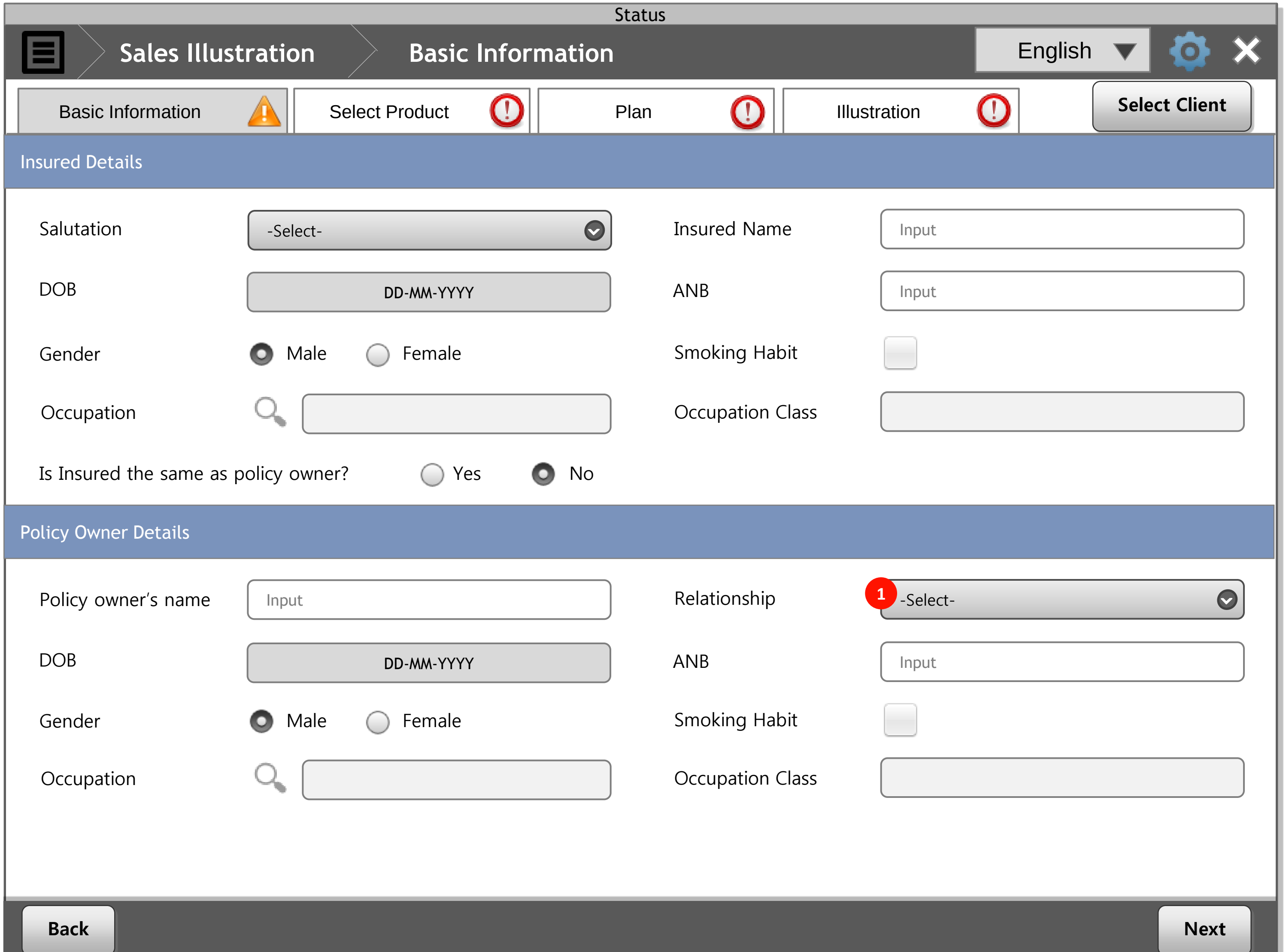
6.1 Basic Information (1/2)



Description	
*	Following scenario can be followed. •Case 1 : Linked from CFFF. Agent can link from other module or select client from “select client” button. •Case 2 : Client data can be entered. (At this point, not stored in client info) MOS will prompt the user if client data should be stored AFTER generating illustration.
1	[Select Client] Button: •If the module comes directly , this is displayed. •Generate illustration after user complete other module, this is hidden.
2	[DOB] Date Picker: •If select date, ANB is auto calculate.
3	[Search Occupation] Button: •Show Search Occupation Popup
4	[Is Insured the same as policy owner?] Radio: •Yes - hide policy owner details •No - display policy owner details •Default : Yes
5	[Next] Button: •If Relationship is spouse, check validation for gender.

6. Sales Illustration

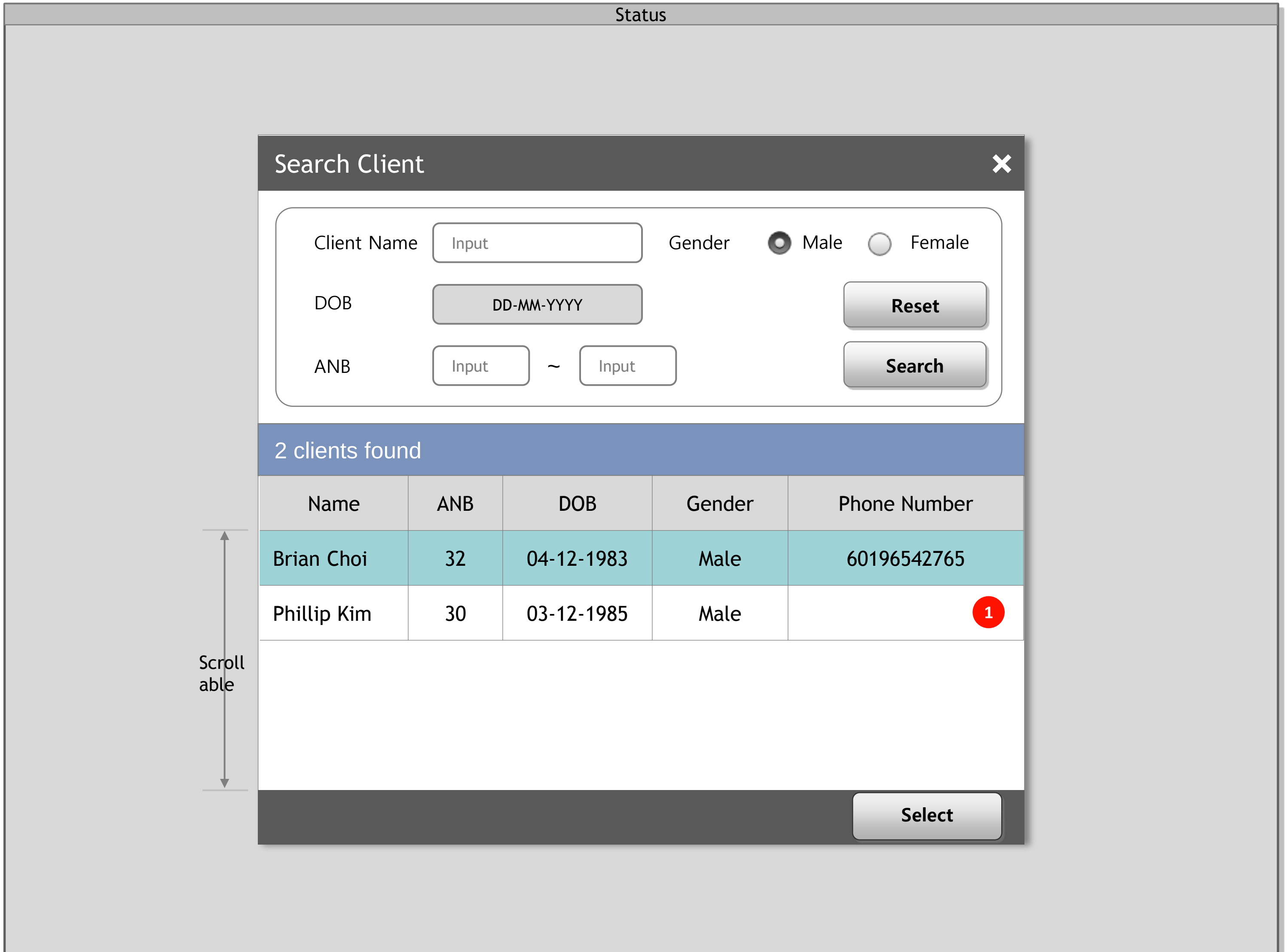
6.1 Basic Information (2/2)



Description	
1	[Relationship] Dropdown: •Parent, Spouse, Others

6. Sales Illustration

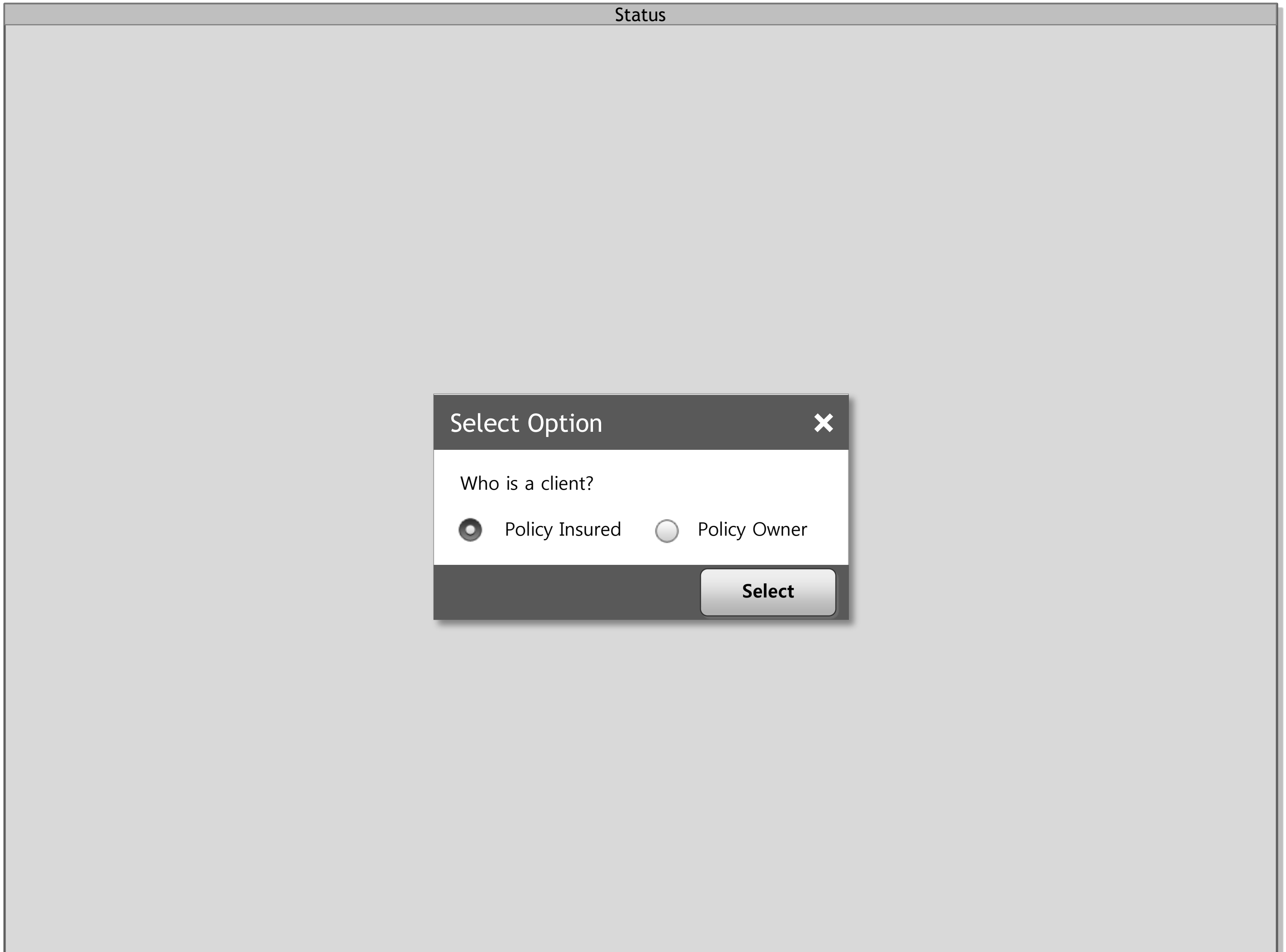
6.1 Basic Information – Search Client Popup



Description	
*	If the module comes directly , first user should select client.

6. Sales Illustration

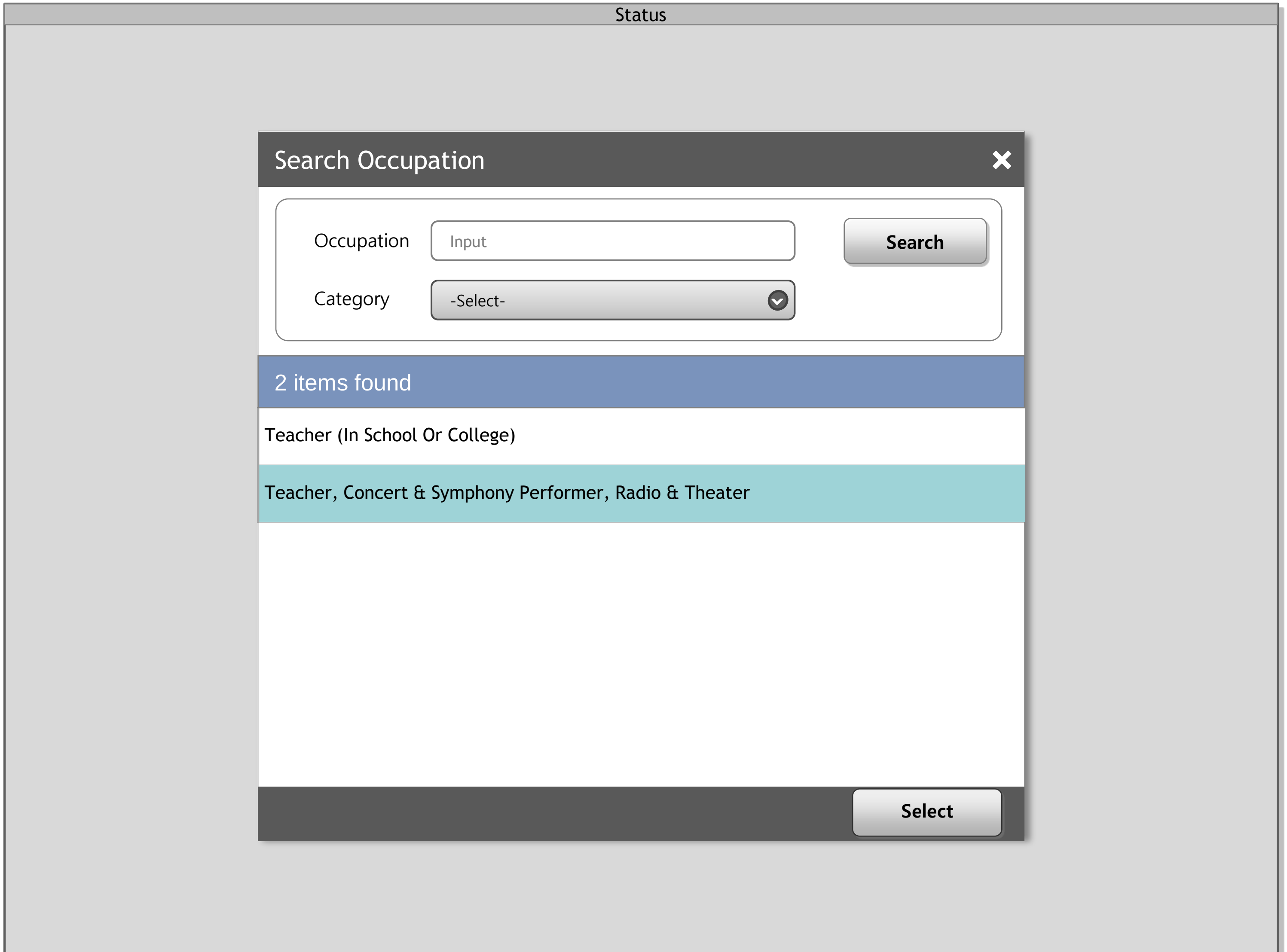
6.1 Basic Information – Search Client Popup(Select Option)



Description	
*	[Who is selected client?] Popup: •Selected client info auto populate to Policy Insured info or •If select policy owner, Is insured the same as policy owner is No.

6. Sales Illustration

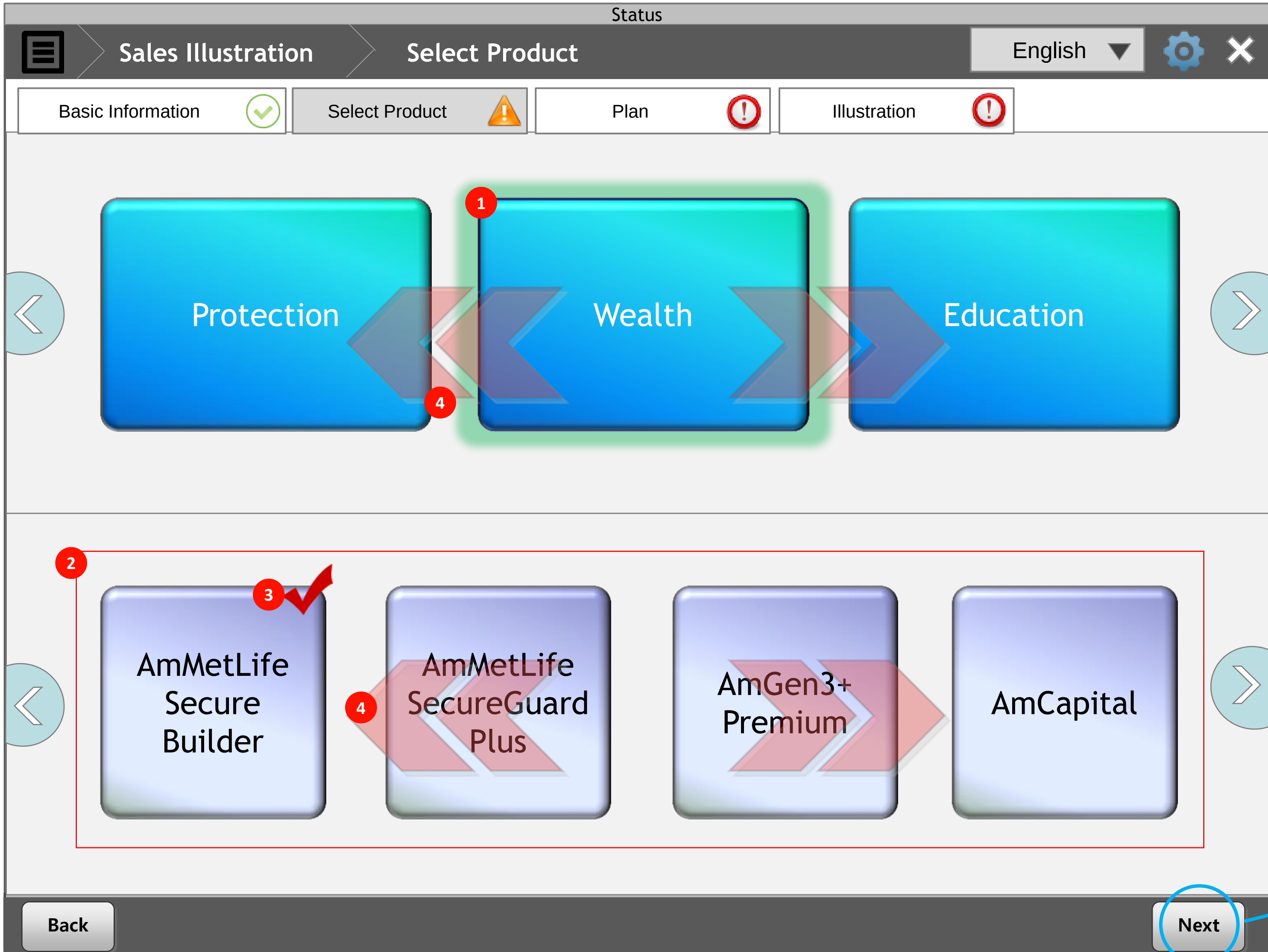
6.1 Basic Information – Search Occupation Popup



	Description
*	Search result is Filtered by Occupation & Category.

6. Sales Illustration

6.2 Select Product



Description	
*	Products are filtered by age and gender of policy insured.
*	Product Category & Product: •Protection - AmMetLife Protect 99, AmBeautiful, AmMetLife Lifestyle, AmMetLife Link •Wealth - AmMetLife Secure Builder, AmMetLife SecureGuard Plus, Am3Gen+ Premum, AmCapital •Education - AmUni Education •Health - AmMetLife SecureCare, AmMetLife Medic Flexi
1	Product Group select Icon • Selected product group is marked as a green color
2	① Products for selected product type is displayed
3	Product select Icon • Selected product is marked with a red check sign at the upper right corner
4	Group is possible to move by dragging with a finger

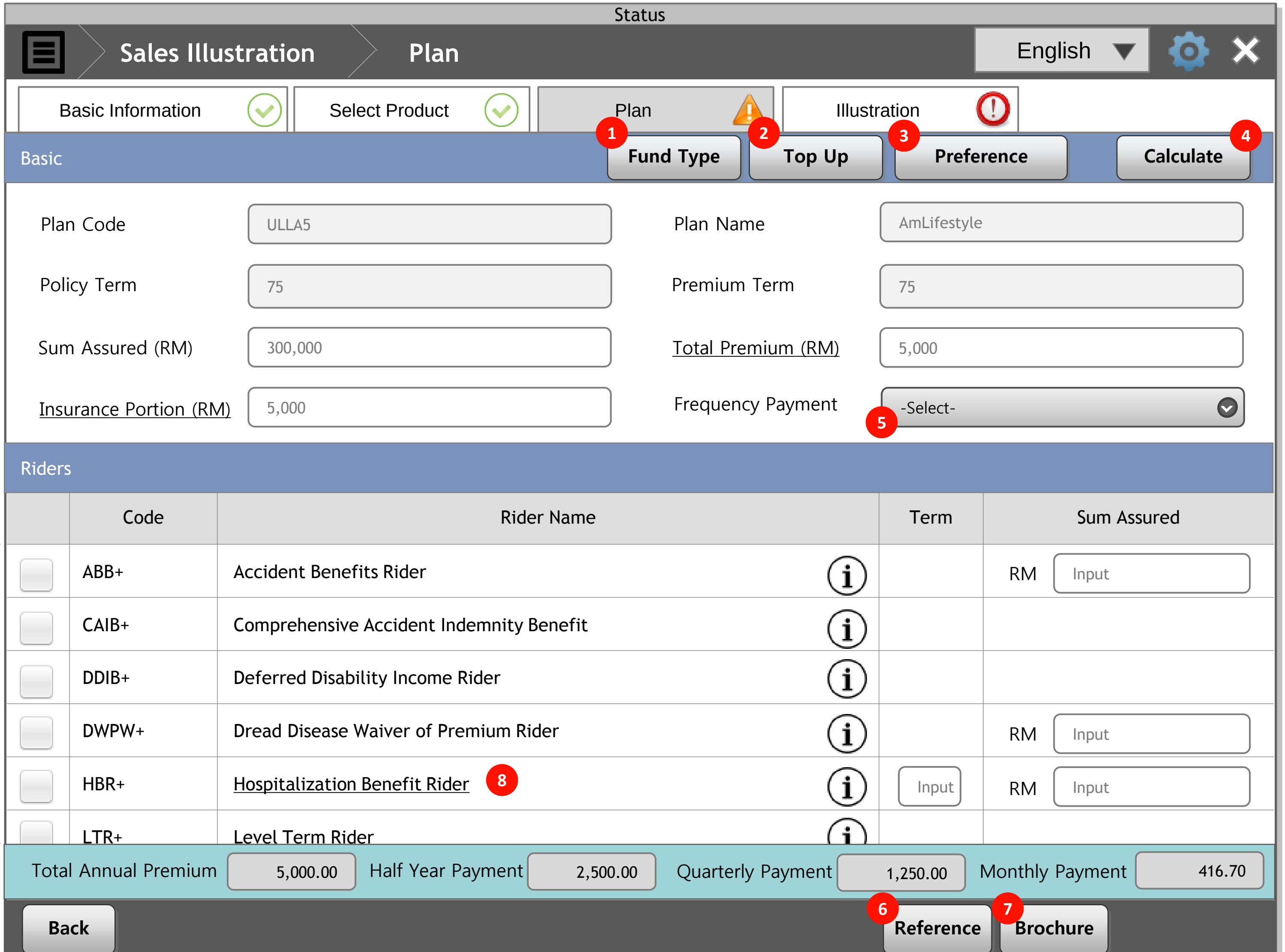
I/F
Get selected product rules from PX

SK C&C

Plan – AmMetLife Lifestyle ,
AmMetLife Link,
AmUni Education

6. Sales Illustration

6.3 Plan (1/2)

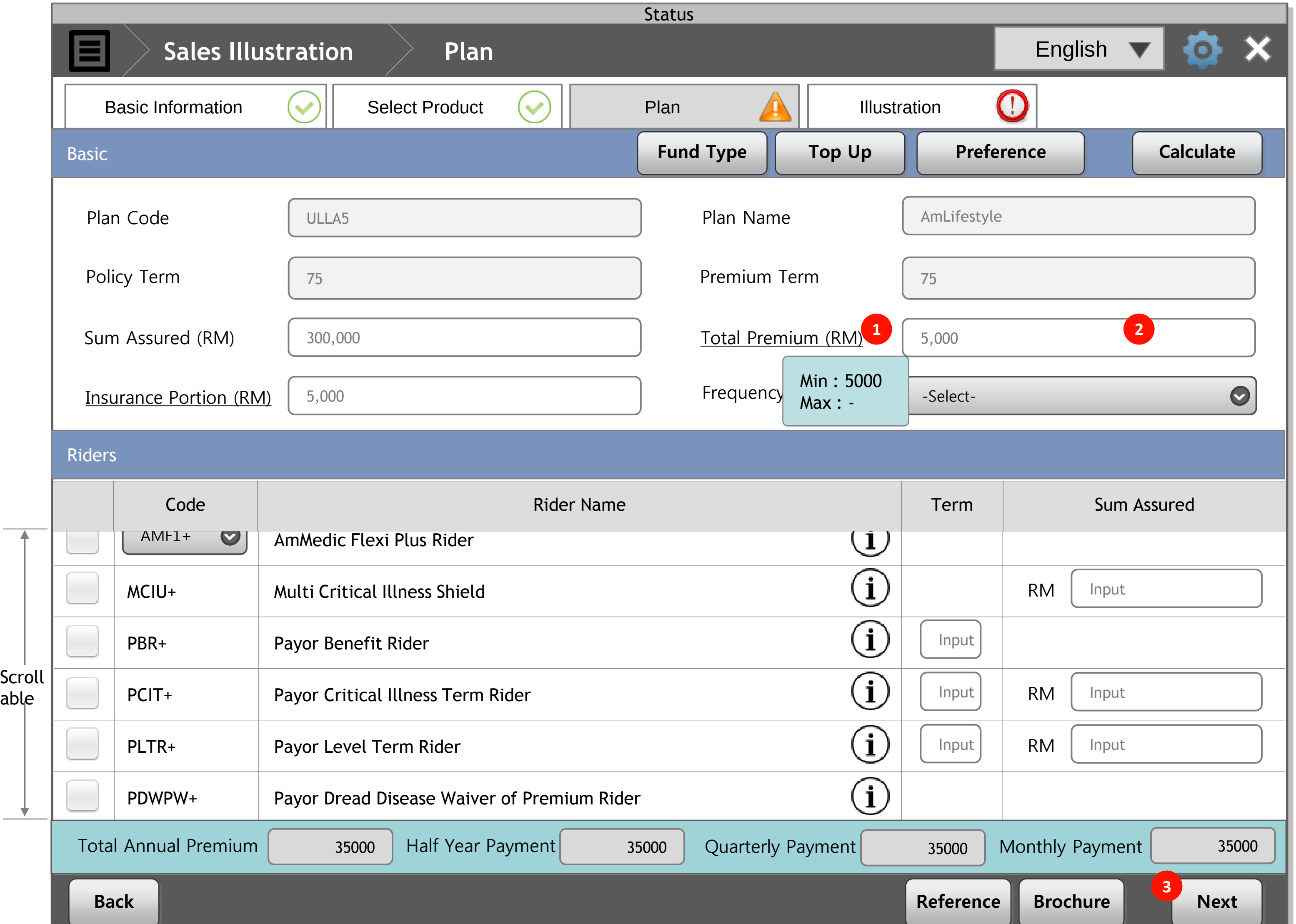


Scroll able

Description	
1	[Fund Type] Button: • Show Fund Type Popup • Only ILP product, show this button
2	[Top Up] Button: •Show Top Up Popup
3	[Preference] Button: •Show Calculate Option Popup
4	[Calculate] Button: •After calculate premium, results are bind to bottom fields.
5	[Frequency Payment] Dropdown: •Annually, Half Yearly, Quarterly, Monthly, Monthly(Biro Angkasa), Monthly(Worksite Mktg Salary Deduction), Monthly(Salary Deduction), EPP • **This option is same for all products**
6	[Reference] Button: •Go to reference of Home page in order to show ILF information PDF
7	[Brochure] Button: •Go to brochure of Home page
8	• **Rider tooltip:** **In case field input is required, tooltip for data entry will be shown in tooltip box. Rider with tooltip is indicated with underline.**

6. Sales Illustration

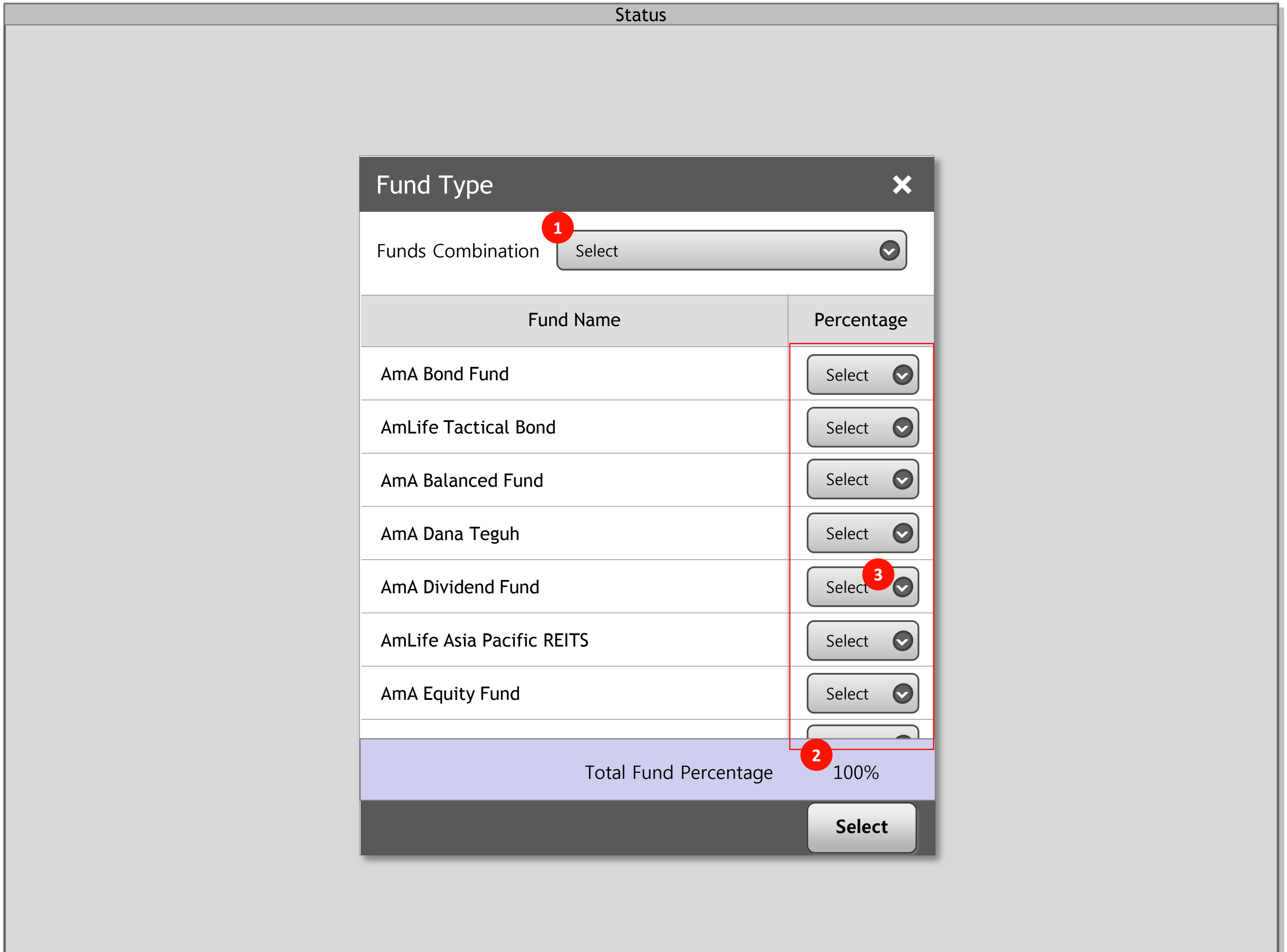
6.3 Plan (2/2)



Description	
1	[Total Premium] Label: • Underlined title will have tooltip
2	[Total Premium] Text Input: •만약 입력한 값이 Min값보다 작으면 Min 값이 자동 바인딩 되고 Max보다 크면 Max 값이 자동 바인딩 됨.
3	[Next] Button: •After calculate premium, this is shown. •Modify any text input or before calculate premium, this is hidden.
4	Attachable Riders • Accident Benefit Rider • AmMedic Flexi Plus Rider Plan 1 • AmMedic Flexi Plus Rider Plan 2 • AmMedic Flexi Plus Rider Plan 3 • AmMedic Flexi Plus Rider Plan 4 • Hospitalisation Benefit Rider • Multi Critical Illness Shield Rider • Comprehensive Accident Indemnity Rider • Critical Illness Term Rider • Level Term Rider • Deferred Disability Income Rider • Dread Disease Waiver of Premium Rider • Payor Benefit Rider • Payor Level Term Rider • Payor Critical Illness Term Rider • Payor Dread Disease Waiver of Premium Rider • Payor Comprehensive WOP • Critical Illness Rider

6. Sales Illustration

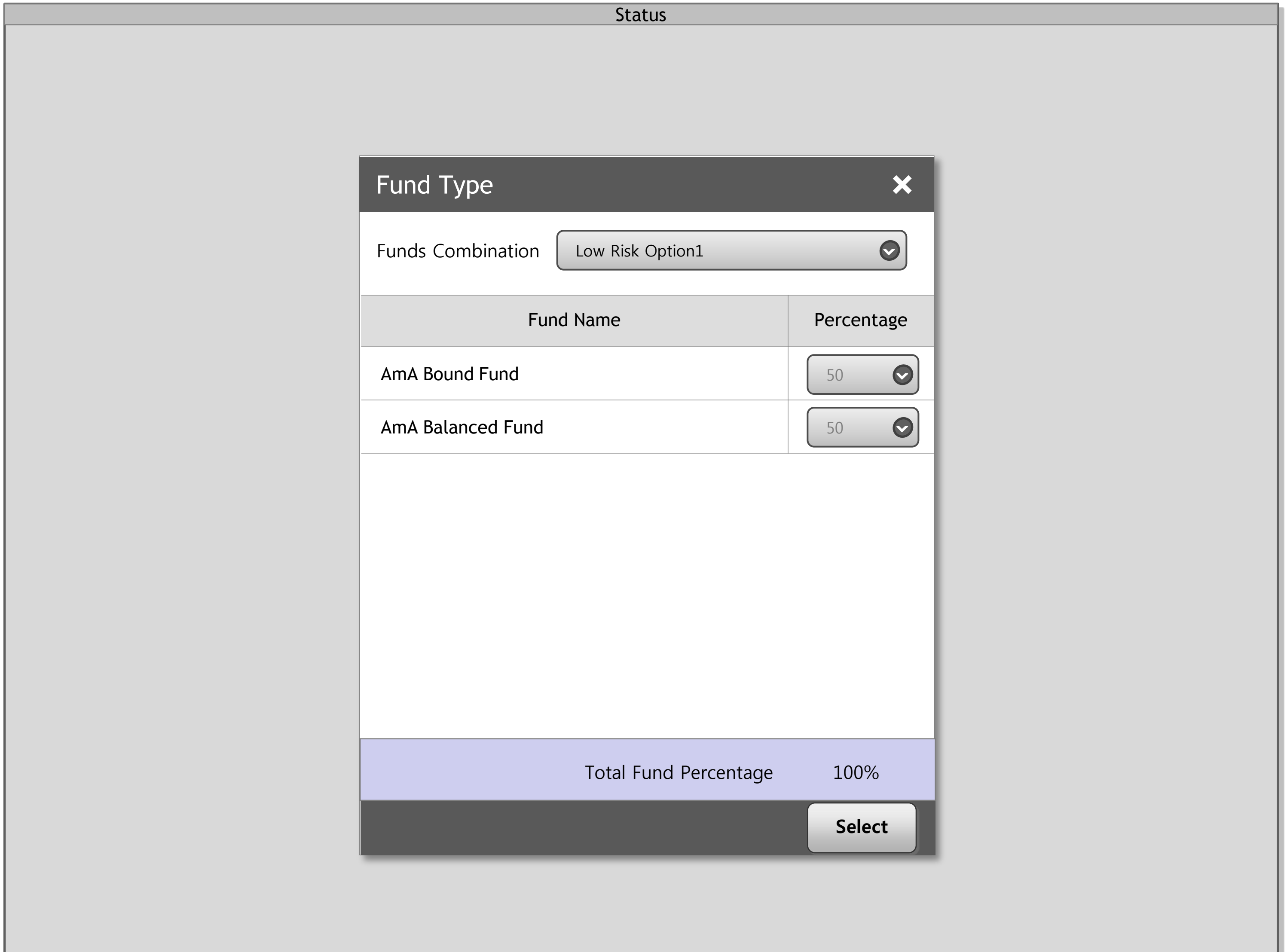
6.3 Plan – Fund Type Popup



Description	
*	If I choose customize, the sequence for the Funds should from Low risk to High risk. If I completed CFFF risk profiling, and the result is high risk appetite, Funds Combination selection will filter accordingly. Just to show high risk option 1, 2, 3, 4 & Customize.
1	[Funds] Combination Dropdown: •Low Risk Option1, Low Risk Option2, Medium Risk Option1, Medium Risk Option2, Hi Risk Option1, Hi Risk Option2, Hi Risk Option3, Hi Risk Option4, Customize •If coming from CFFF, list will be filtered based on appetite. •Fund will be listed based on fund option except for customization to option.
2	Auto be calculated
3	[Percentage] Dropdown: •0~100, interval 5 •Enabled when Funds Combination is 'customize'.
4	If finds combination select Customize, calculate appetite for selected rider info. •0~25 : Low List •26~75 : Medium List •76~ : High List

6. Sales Illustration

6.3 Plan – Fund Type Popup – Case select Low Risk Option 1



Description	
*	For predefined fund option, remaining fund will not be displayed

6. Sales Illustration

6.3 Plan – Top Up Popup

Status

Single Top Up ✕

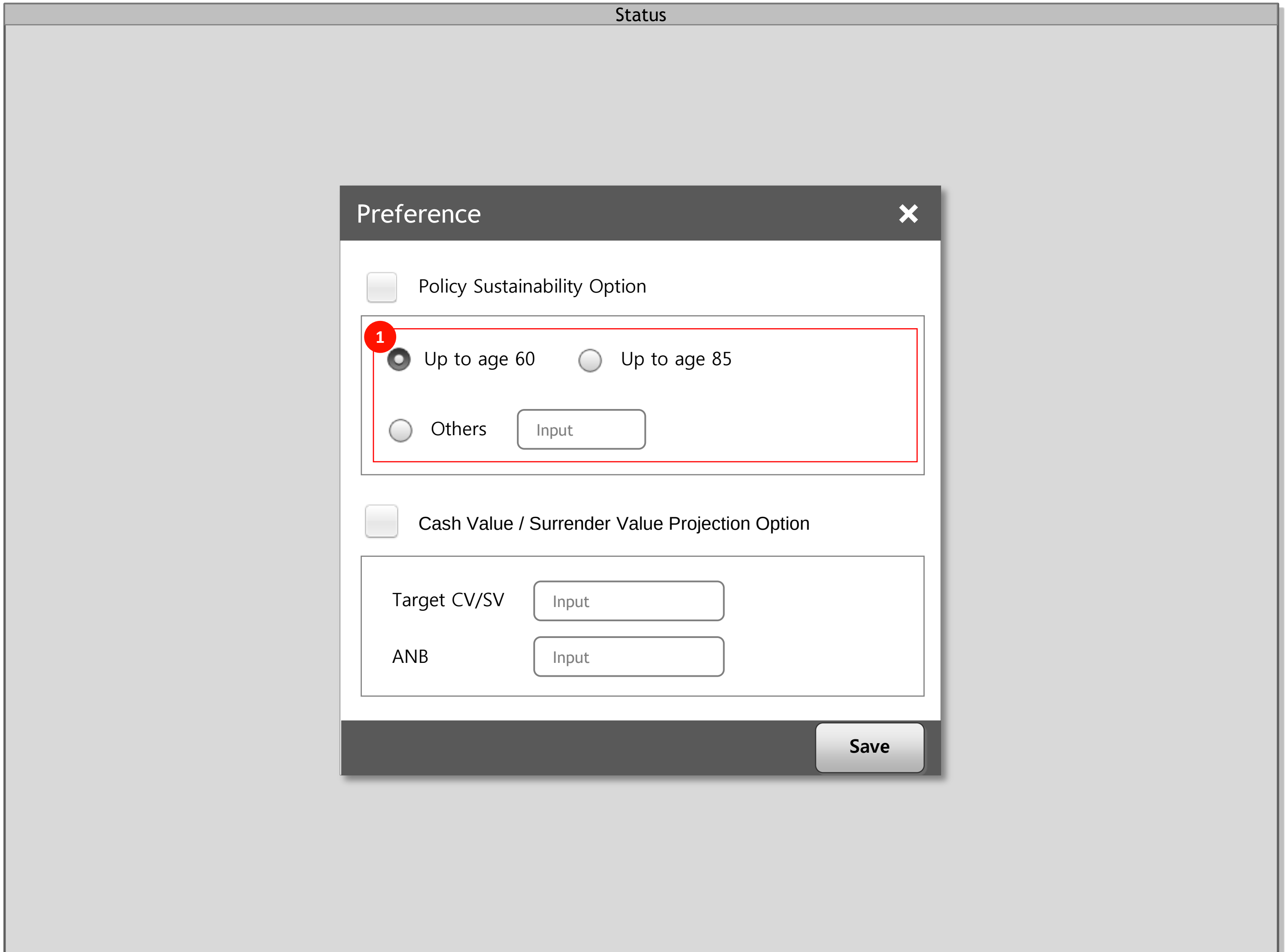
Year	Amount (RM)	Year	Amount (RM)	Year	Amount (RM)
1	Input	11	Input	21	Input
2	Input	12	Input	22	Input
3	Input	13	Input	23	Input
4	Input	14	Input	24	Input
5	Input	15	Input	25	Input
6	Input	16	Input	26	Input
7	Input	17	Input	27	Input
8	Input	18	Input	28	Input
9	Input	19	Input	29	Input
10	Input	20	Input	30	Input

1 Reset Select

Description	
*	Before checking the option, radio box or field entry is disabled.
1	[Reset] Button: • All amount text input are reset.

6. Sales Illustration

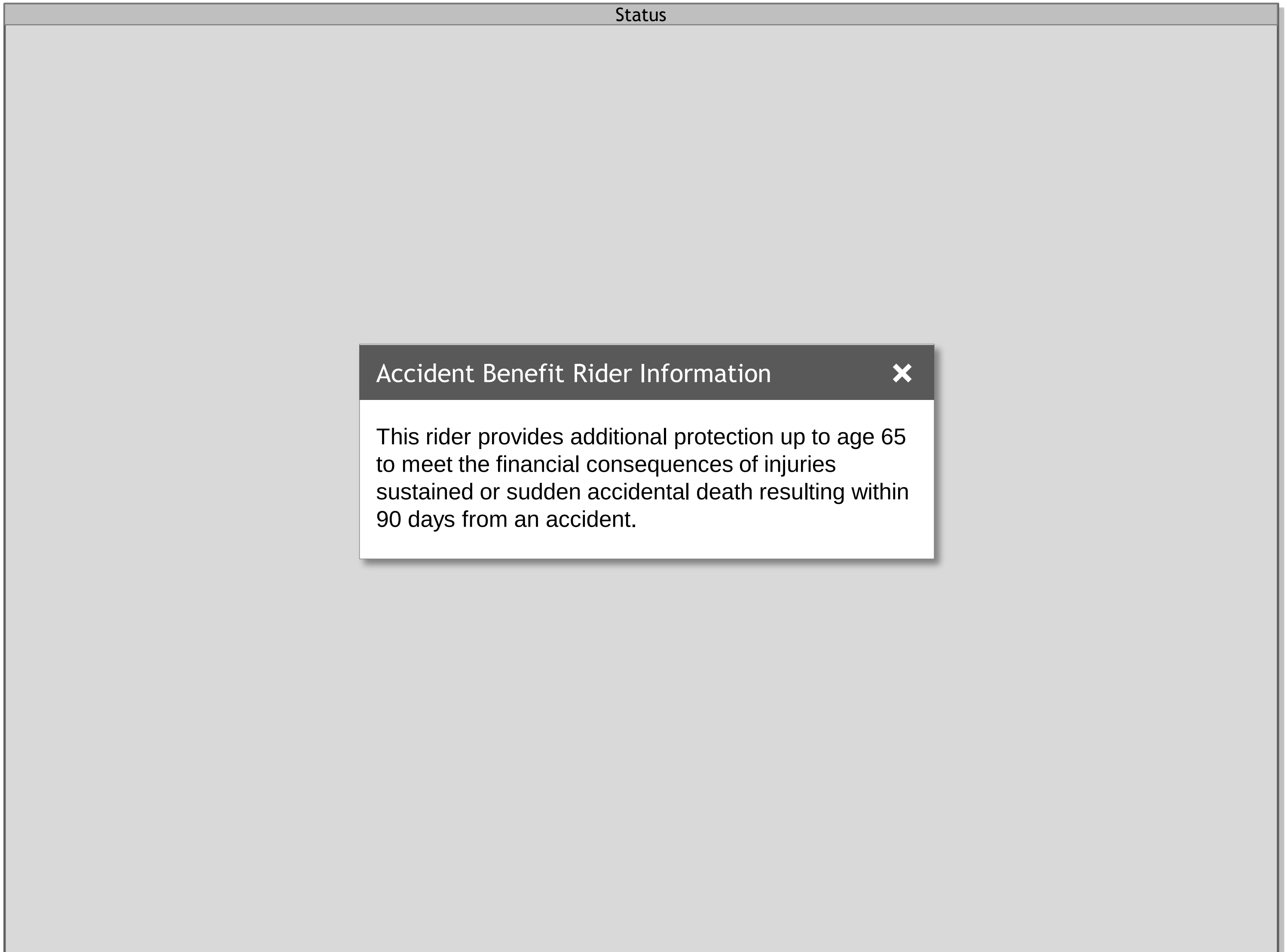
6.3 Plan – Preference Popup



Description	
*	Before checking the option, radio box or field entry is disabled.
1	Option will be changed based on selected product

6. Sales Illustration

6.3 Plan – Rider Information Popup

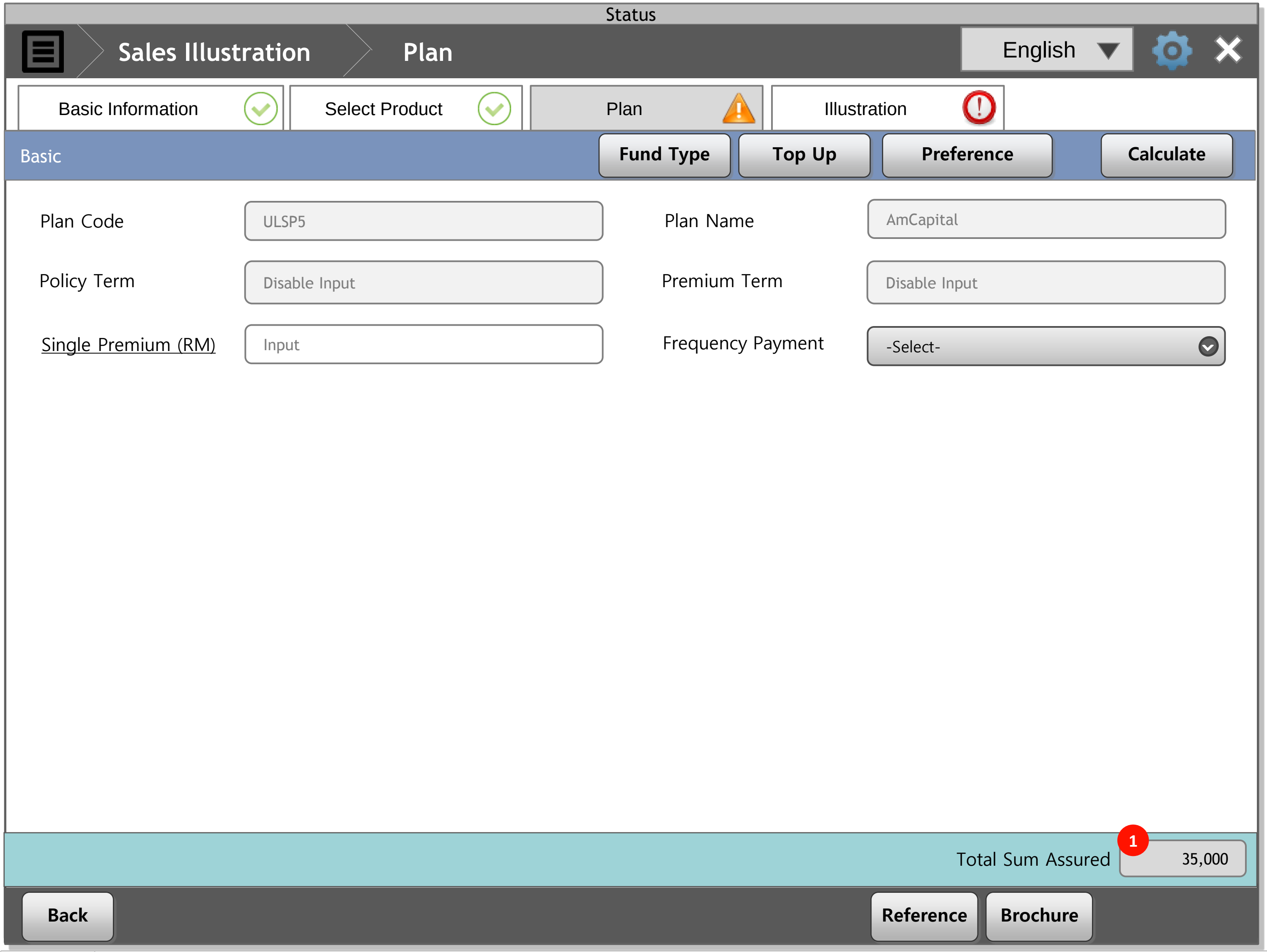


Description	
*	Rider description message will be displayed

Plan – AmCapital

6. Sales Illustration

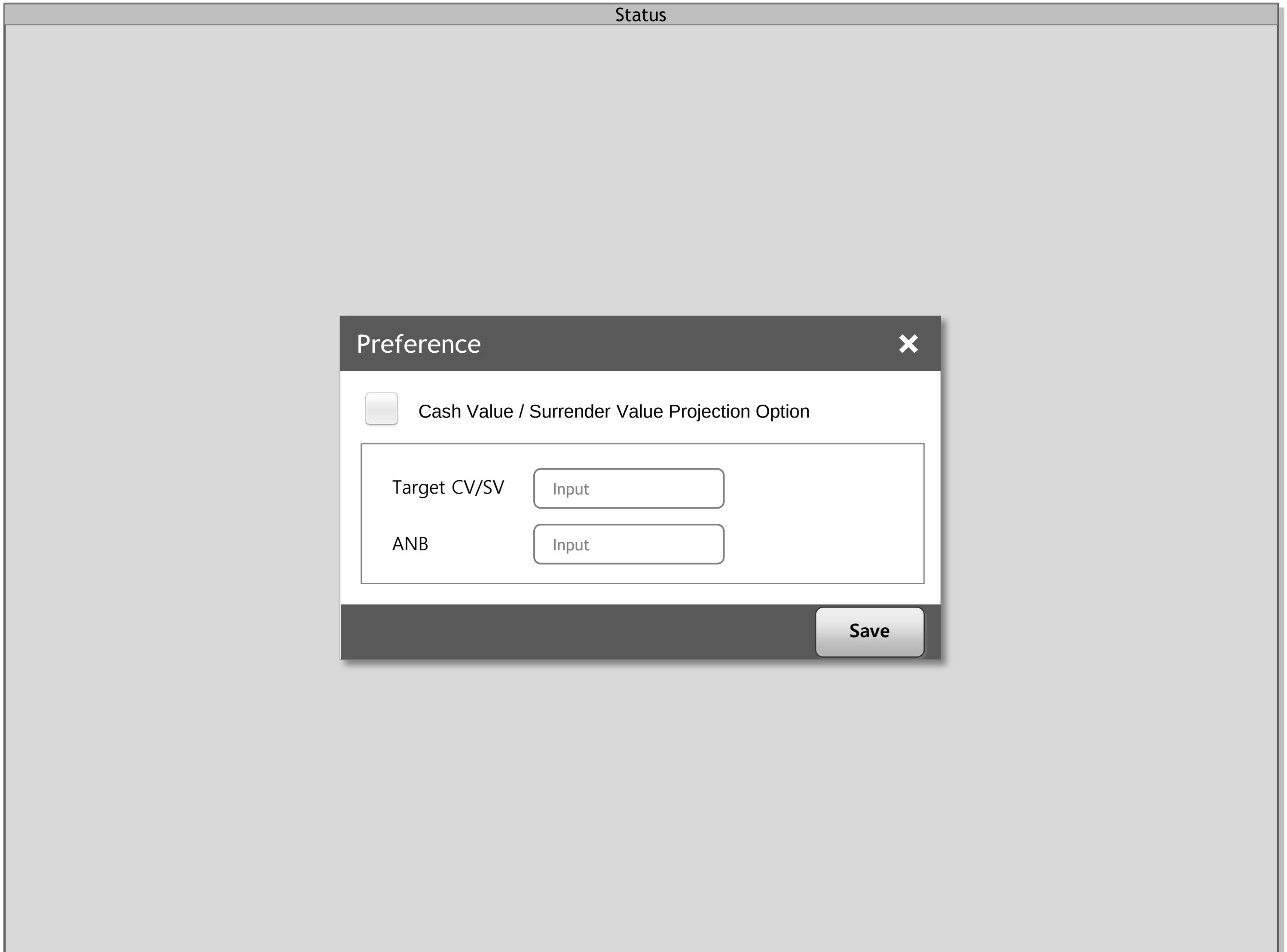
6.3 Plan - AmCapital



Description	
1	[Total Sum Assured] Text Input: • Disabled • AmCapital result will show only Total Sum Assured

6. Sales Illustration

6.3 Plan – Preference Popup

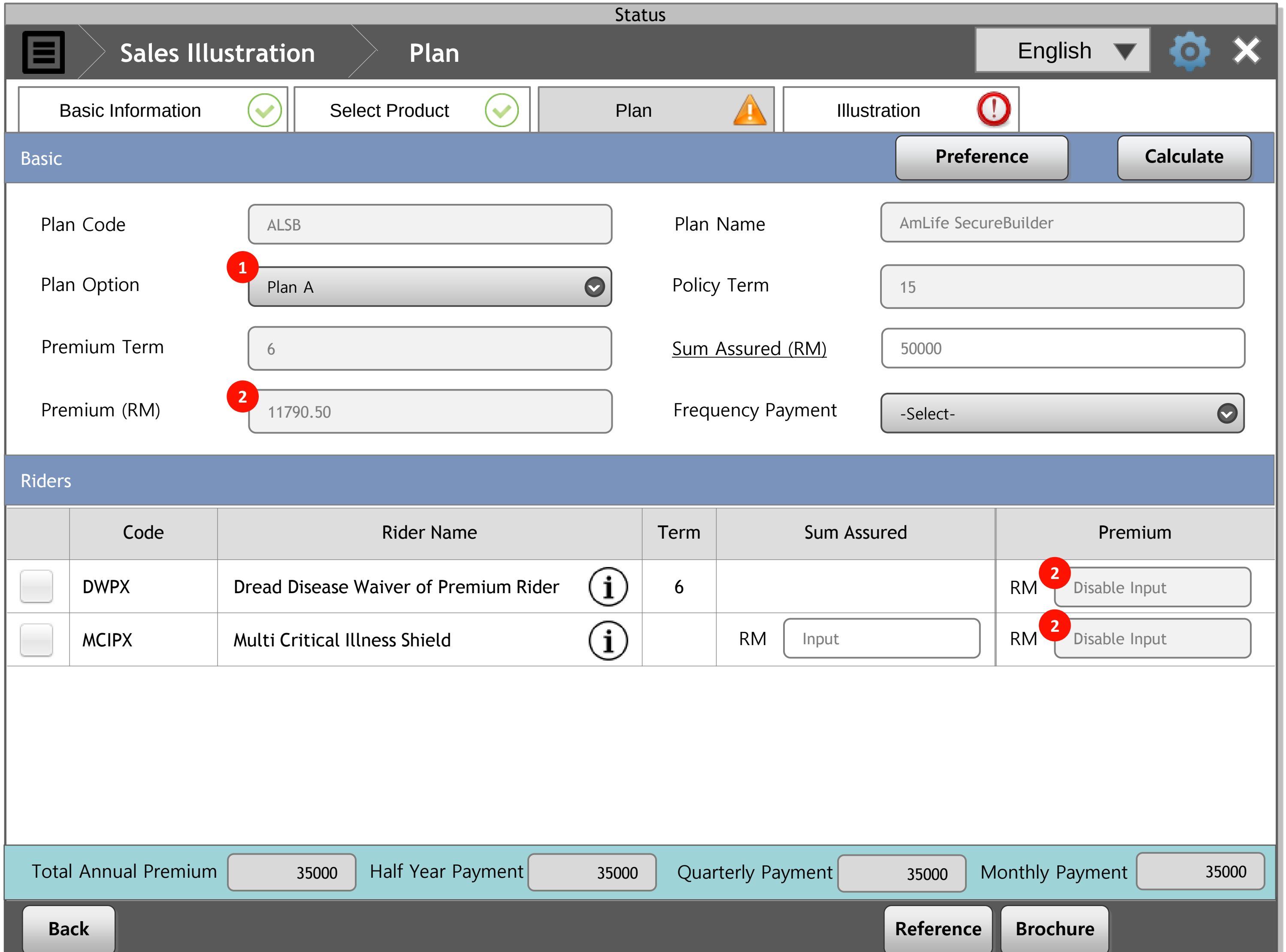


	Description
*	Preference list will be displayed based on selected product.

Plan - AmLife Secure Builder

6. Sales Illustration

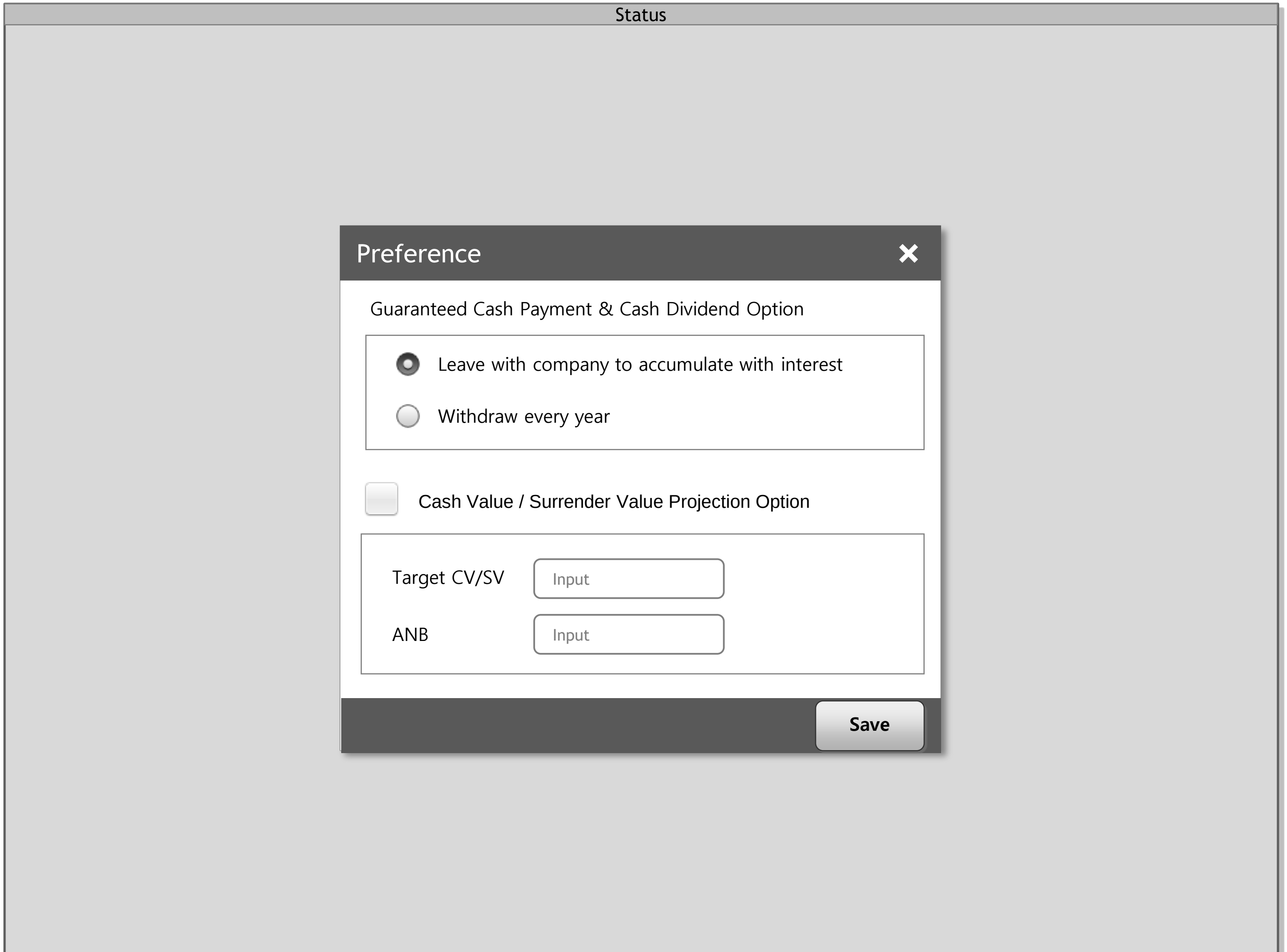
6.3 Plan – AmLife SecureBuilder



Description	
1	[Plan Option] Dropdown: • Plan A - Premium term 6 years, Policy Term 15 years • Plan B - Premium term 6 years, Policy Term 20 years • Plan C - Premium term 10 years, Policy Term 20 years • Plan D - Premium term 10 years, Policy Term 25 years • Term, Premium Term data will be auto-populated based on selected option.
2	[Premium] Text input: •Disable input •Value will be populated when Calculate button is clicked. •Sum of premium will be displayed in Total annual Premium
3	Attachable Rider •Dread Disease Waiver of Premium •Multi Critical Illness Shield Rider •Payor Benefit Rider •Payor Dread Disease Waiver of Premium Rider

6. Sales Illustration

6.3 Plan – Preference Popup

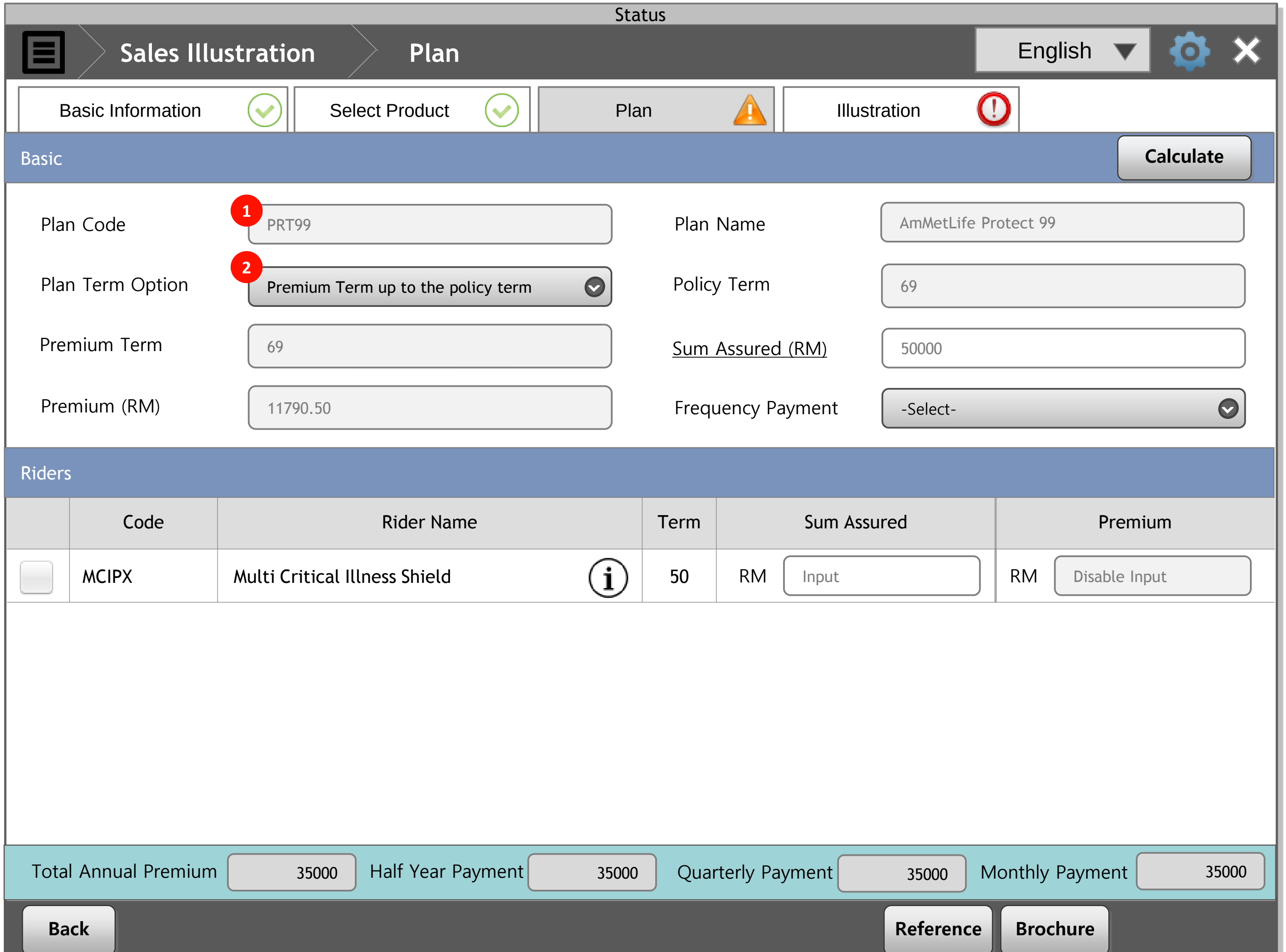


Description	
*	Preference list will be displayed based on selected product.

Plan – AmMetLife Protect 99

6. Sales Illustration

6.3 Plan – AmMetLife Protect 99



Description	
1	[Plan Code] Text Input: • Disabled. • Plan code is depend on plan term option selected: • If Premium Term up to age 20 years, plan code is PRT20 • If Premium Term up to age 25 years, plan code is PRT25 • If Premium Term up to the policy term, plan code is PRT99
2	[Plan Term Option] Dropdown: • Premium Term up to 20 years, Premium Term up to 25 years, Premium Term up to the policy term (i.e. up to age 99)
	Attachable riders • Accident Benefit Rider • AmMedic Flexi Plus Rider Plan 1 • AmMedic Flexi Plus Rider Plan 2 • AmMedic Flexi Plus Rider Plan 3 • AmMedic Flexi Plus Rider Plan 4 • Hospitalisation Benefit Rider • Multi Critical Illness Shield Rider • Comprehensive Accident Indemnity Rider • Critical Illness Term Rider • Level Term Rider • Deferred Disability Income Rider • Dread Disease Waiver of Premium Rider • Payor Benefit Rider • Payor Critical Illness Term Rider • Payor Dread Disease Waiver of Premium Rider • Payor Level Term Rider

Plan – AmMetLife SecureGuard Plus

6. Sales Illustration

6.3 Plan – AmMetLife SecureGuard Plus

Status

Sales Illustration | Plan | English |

Basic Information | Select Product | Plan | Illustration

Basic | **Preference** | **Calculate**

Plan Code	BTASGP1EPA	Plan Name	AmMetLife SecureGuard Plus
Policy Term	21	Premium Term	21
Sum Assured (RM)	50000	Premium (RM)	11790.50
Frequency Payment	-Select-		

Riders

	Code	Rider Name	Term	Sum Assured	Premium
	ABLP	Multi Critical Illness Shield		RM Input	RM Disable Input
	AMF1+	AmMedic Flexi Plus			
	CAILP	Comprehensive Accident Indemnity Benefit		RM Input	
	CITX	Critical Illness Term Rider	Input	RM Input	
	DDILP	Deferred Disability Income Rider			
	HBRLP	Hospitalization Benefit Rider		RM Input	

Total Annual Premium	Half Year Payment	Quarterly Payment	Monthly Payment
35000	35000	35000	35000

Back | **Reference** | **Brochure**

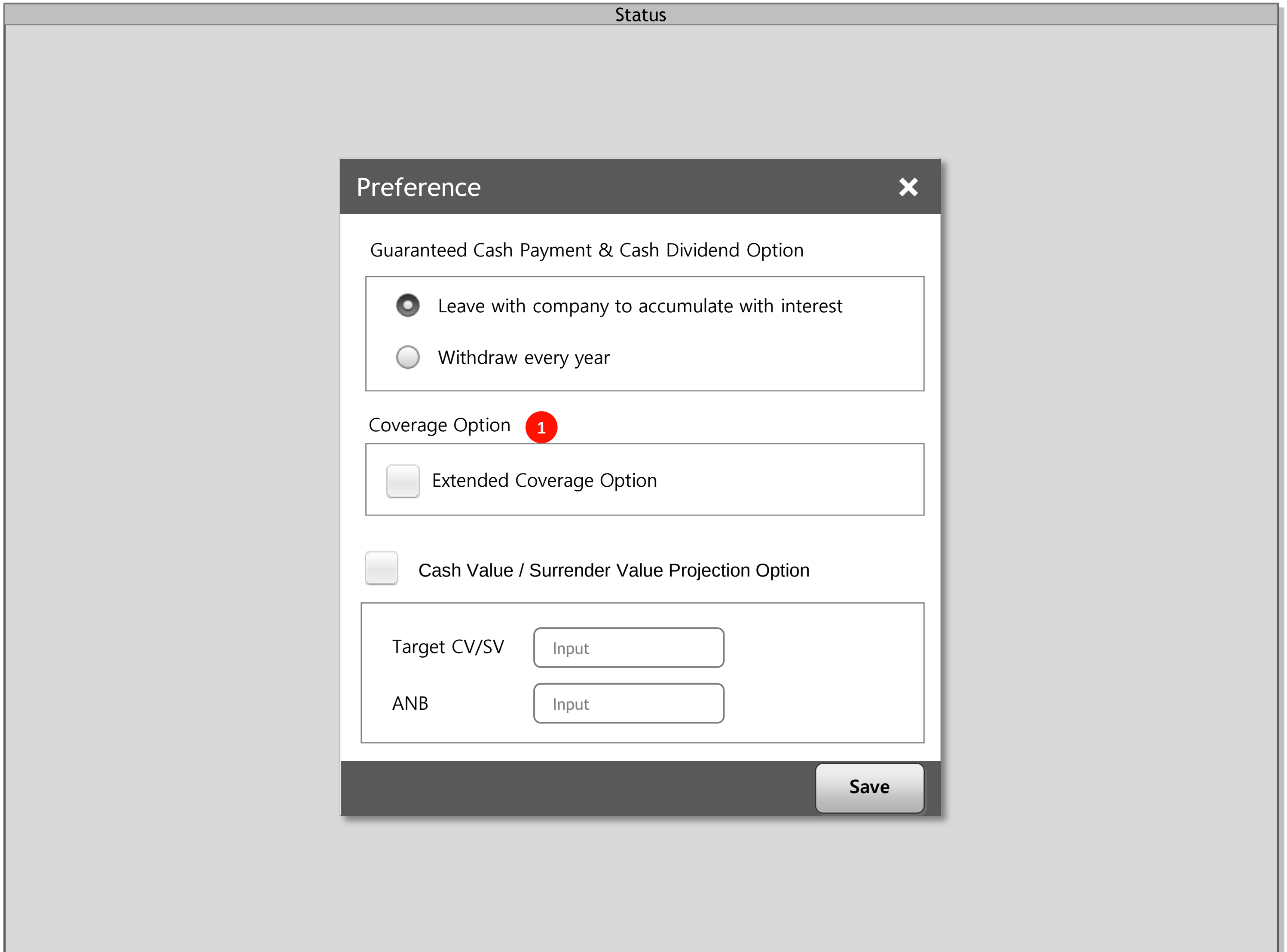
Description

1 [Plan Term Option] Dropdown:
- Regular Payment, 20-Year Payment, 25-Year Payment

Attachable Riders
- Accident Benefit Rider
- AmMedic Flexi Plus Rider Plan 1
- AmMedic Flexi Plus Rider Plan 2
- AmMedic Flexi Plus Rider Plan 3
- AmMedic Flexi Plus Rider Plan 4
- Comprehensive Accident Indemnity Rider
- Critical Illness Term Rider
- Deferred Disability Income Rider
- Hospitalisation Benefit Rider
- Level Term Rider
- Multi Critical Illness Shield Rider
- Payor Benefit Rider
- Payor Critical Illness Term Rider
- Payor Dread Disease Waiver of Premium Rider
- Payor Level Term Rider

6. Sales Illustration

6.3 Plan – Preference Popup

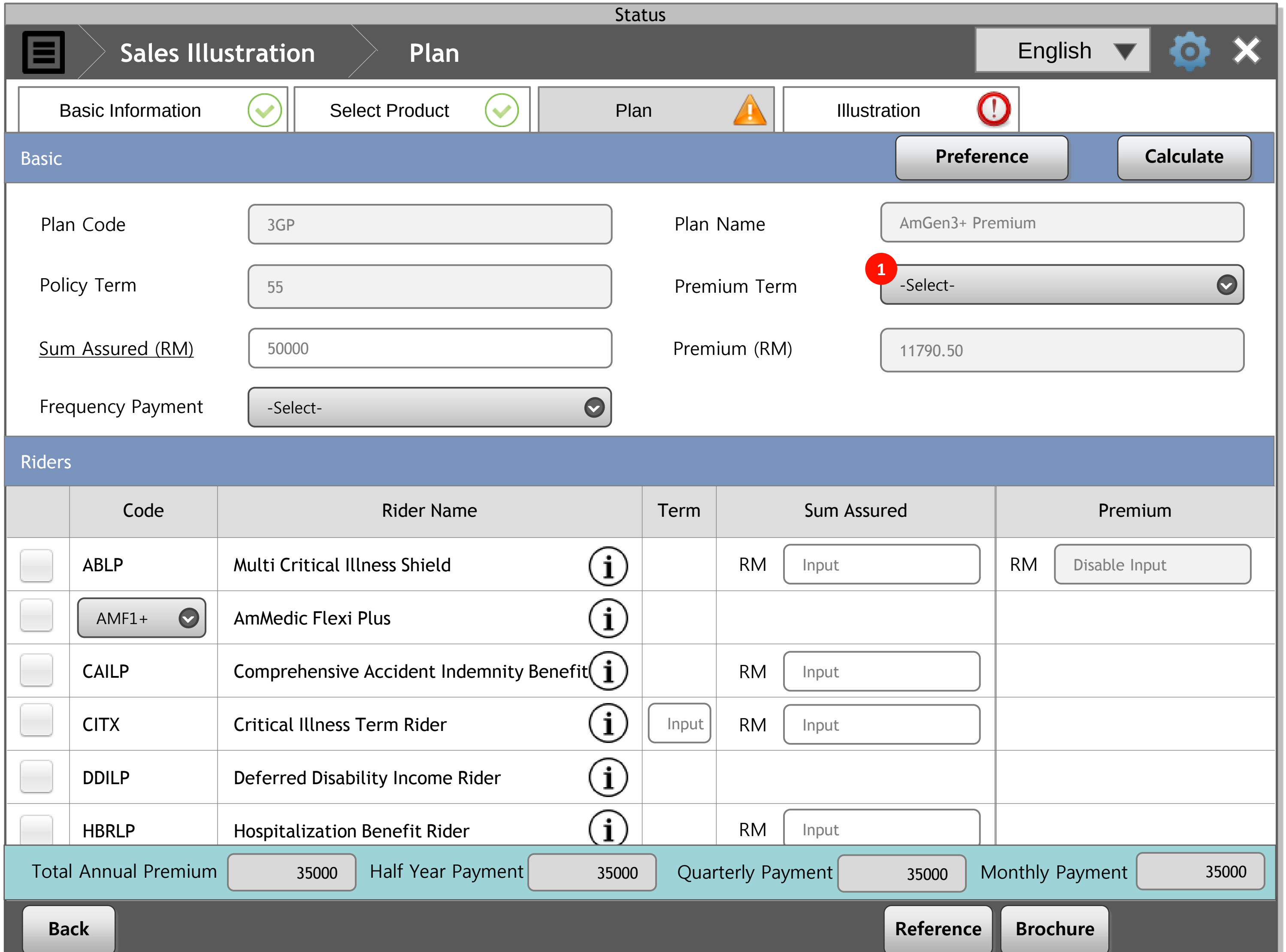


Description	
*	Preference list will be displayed based on selected product.
1	[Coverage Option] • If extended coverage is selected, the Policy Term will be '31'

Plan – AmSecure Wealth (AmGen3+ Premium)

6. Sales Illustration

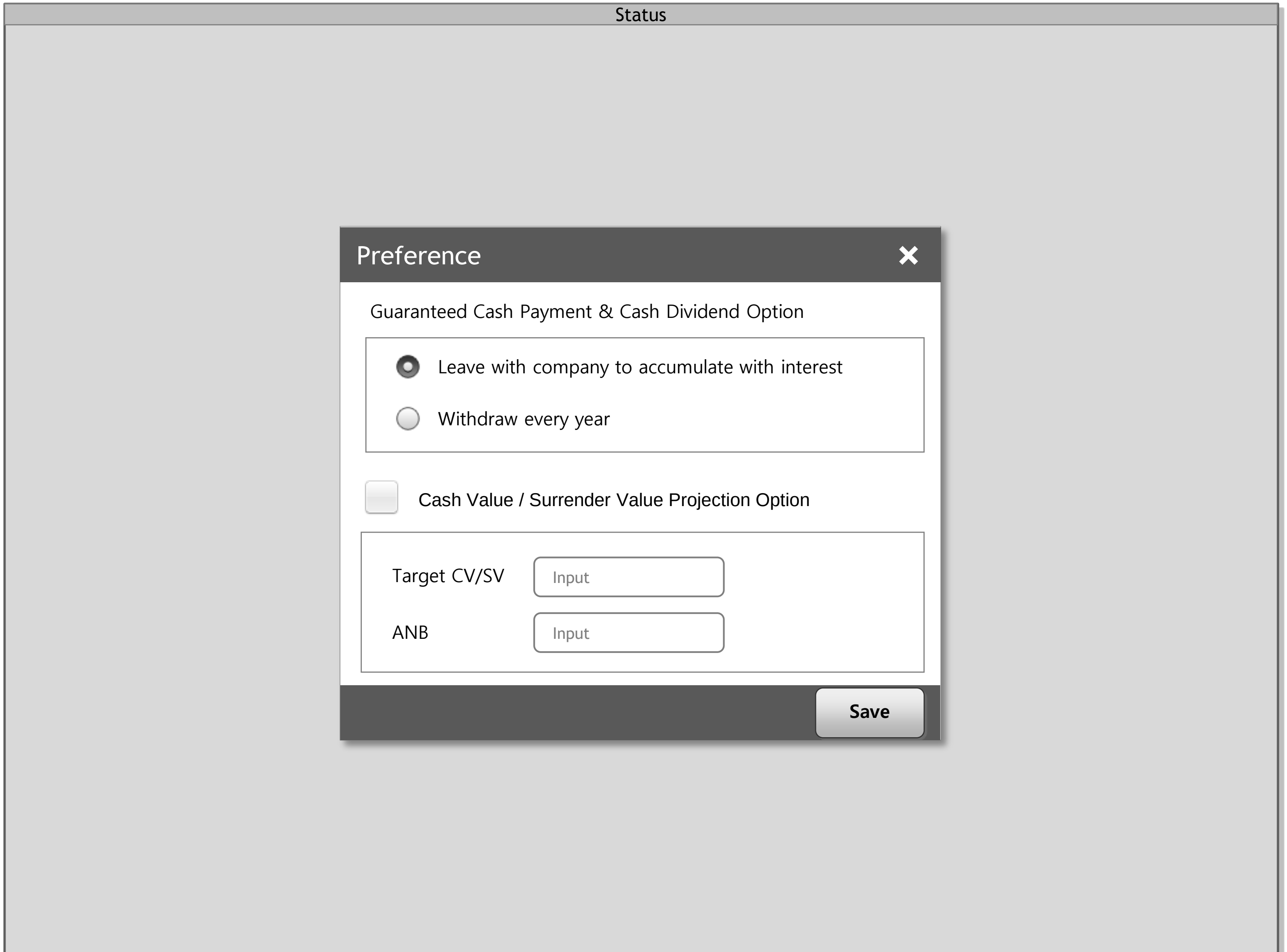
6.3 Plan – AmSecure Wealth



Description	
1	[Premium Term] Dropdown: • 5years, 10 years, 20 years
	Attachable Rider • Accident Benefit Rider • AmMedic Flexi Plus Rider Plan 1 • AmMedic Flexi Plus Rider Plan 2 • AmMedic Flexi Plus Rider Plan 3 • AmMedic Flexi Plus Rider Plan 4 • Comprehensive Accident Indemnity Rider • Critical Illness Term Rider • Deferred Disability Income Rider • Dread Disease Waiver of Premium Rider • Hospitalisation Benefit Rider • Level Term Rider • Multi Critical Illness Shield Rider • Payor Benefit Rider • Payor Critical Illness Term Rider • Payor Dread Disease Waiver of Premium Rider • Payor Level Term Rider

6. Sales Illustration

6.3 Plan – Preference Popup

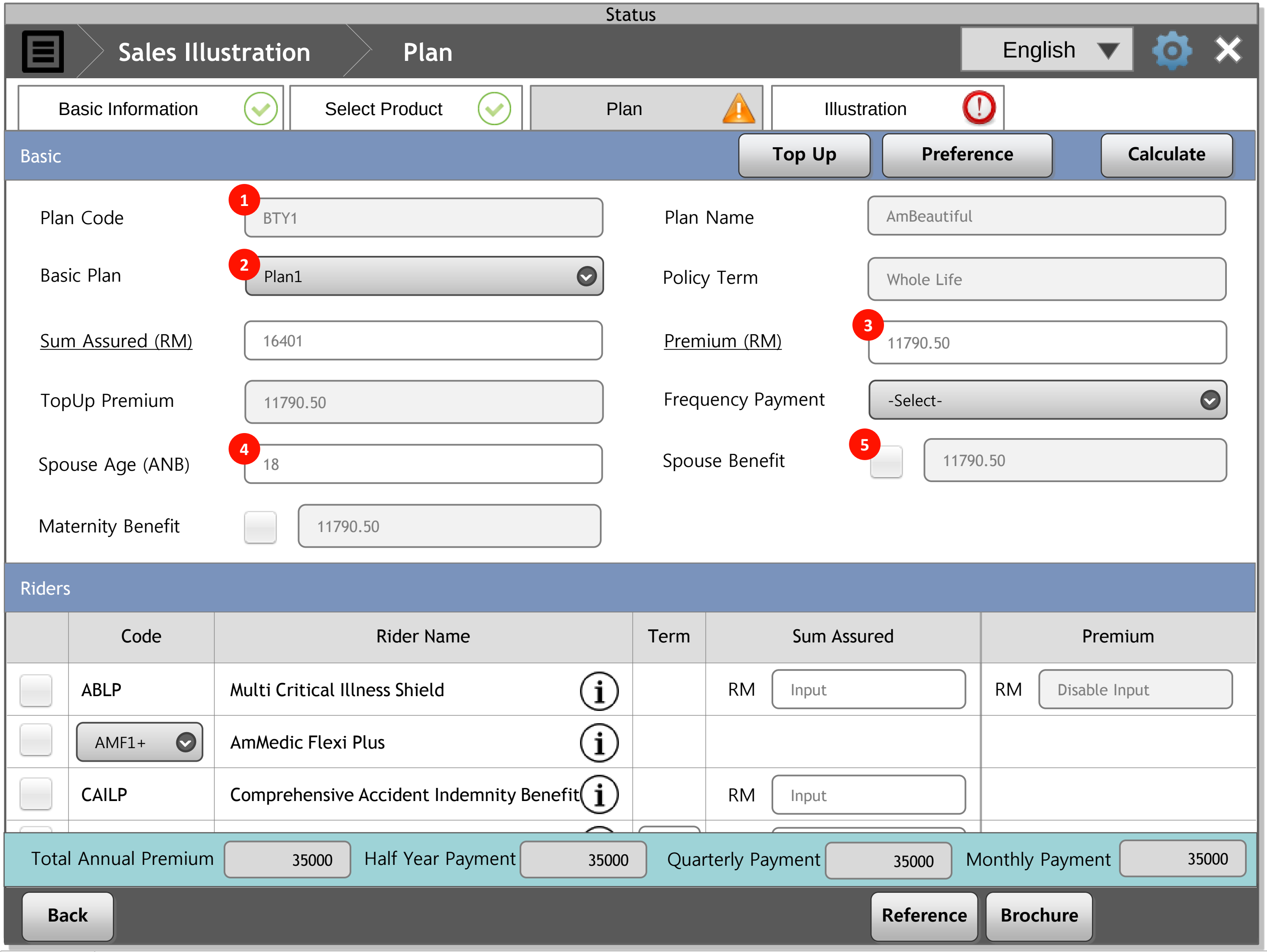


Description	
*	Preference list will be displayed based on selected product.

Plan – AmBeautiful

6. Sales Illustration

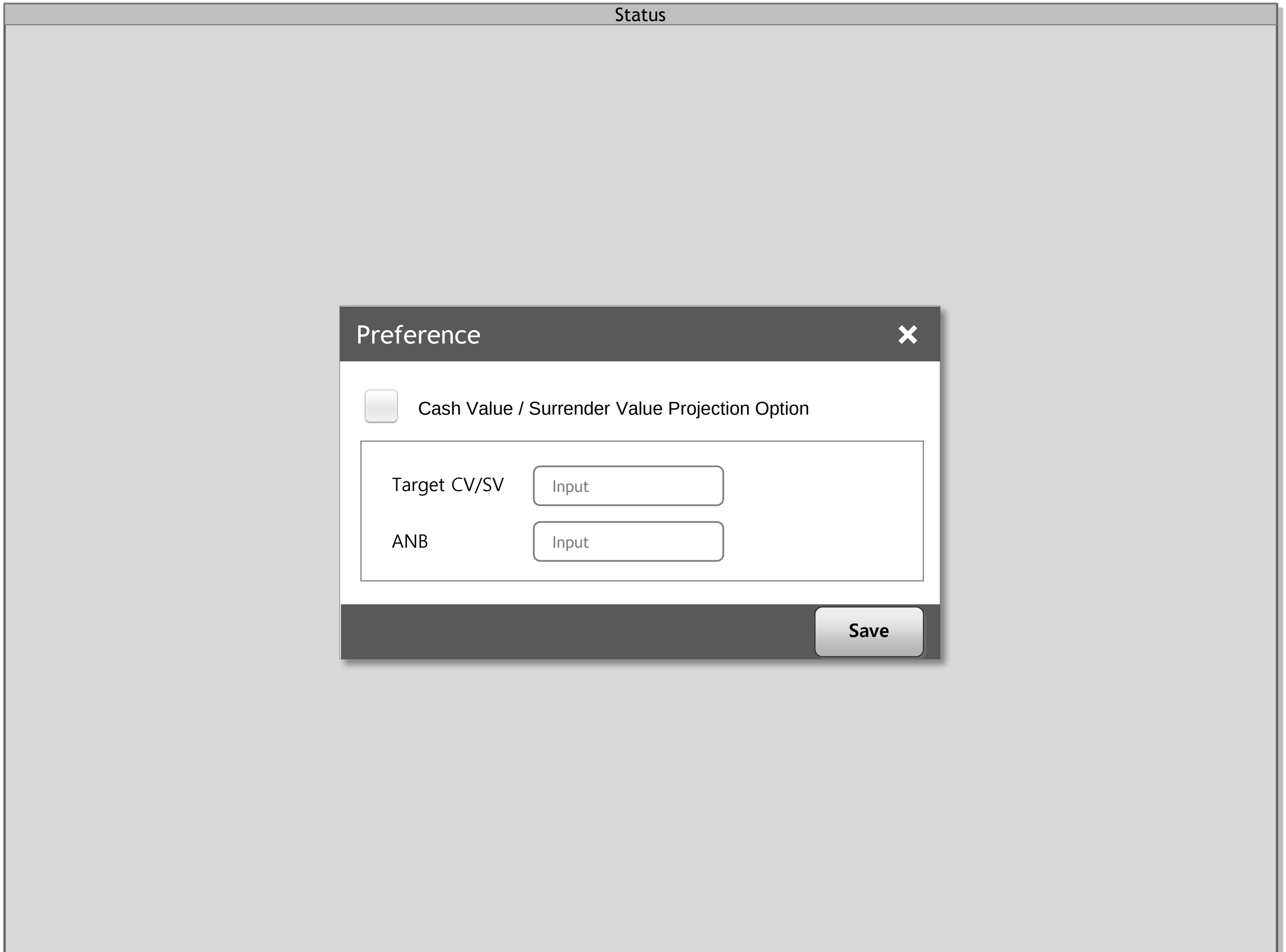
6.3 Plan – AmBeautiful



	Description
1	[Plan Code] Text Input: • Disabled • Plan code is depend on Basic Plan selected: • If Plan 1, plan code is BTY1 • If Plan 2, plan code is BTY2 • If Plan 3, plan code is BTY3 • If Plan 4, plan code is BTY4
2	[Basic Plan] Dropdown: • Plan1, Plan2, Plan3, Plan4
3	[Premium] Text Input: • If premium calculation is done with value higher than the min, topup premium value will be displayed and additional premium will be populated in Year 1 on topup popup window.
4	[Spouse Age] Text Input: • Spouse age from 18-60
5	[Spouse Benefit] Attribute: • Calculated value is auto-populated if user check on the box
	Attachable Riders • Accident Benefit Rider • AmMedic Flexi Plus Rider Plan 1 • AmMedic Flexi Plus Rider Plan 2 • AmMedic Flexi Plus Rider Plan 3 • AmMedic Flexi Plus Rider Plan 4 • Hospitalisation Benefit Rider • Multi Critical Illness Shield Rider • Comprehensive Accident Indemnity Rider • Critical Illness Term Rider • Level Term Rider • Deferred Disability Income Rider • Dread Disease Waiver of Premium Rider • Payor Benefit Rider • Payor Critical Illness Term Rider • Payor Dread Disease Waiver of Premium Rider

6. Sales Illustration

6.3 Plan – Preference Popup

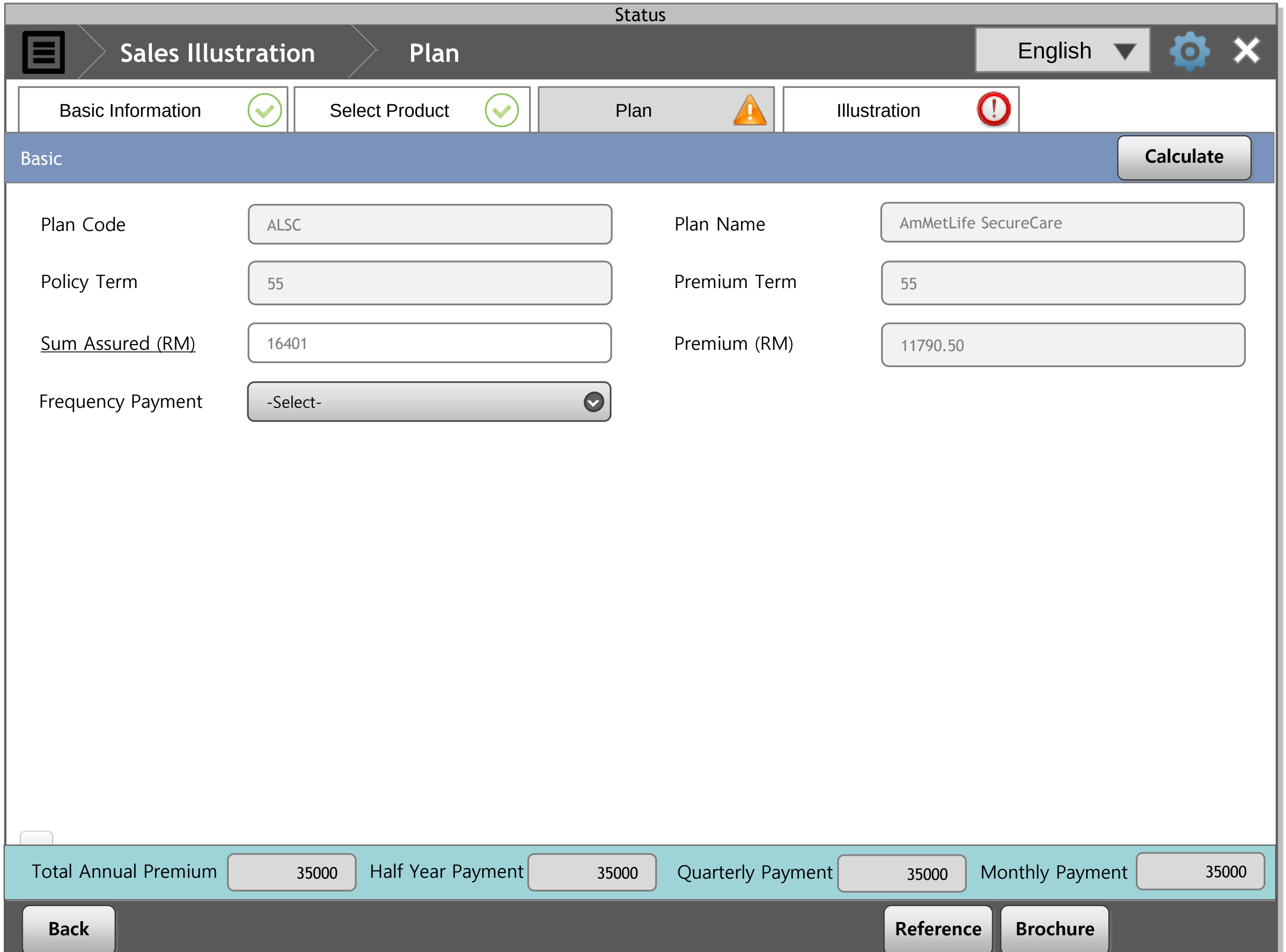


	Description
*	Preference list will be displayed based on selected product.

Plan – AmMetLife SecureCare

6. Sales Illustration

6.3 Plan – AmMetLife SecureCare

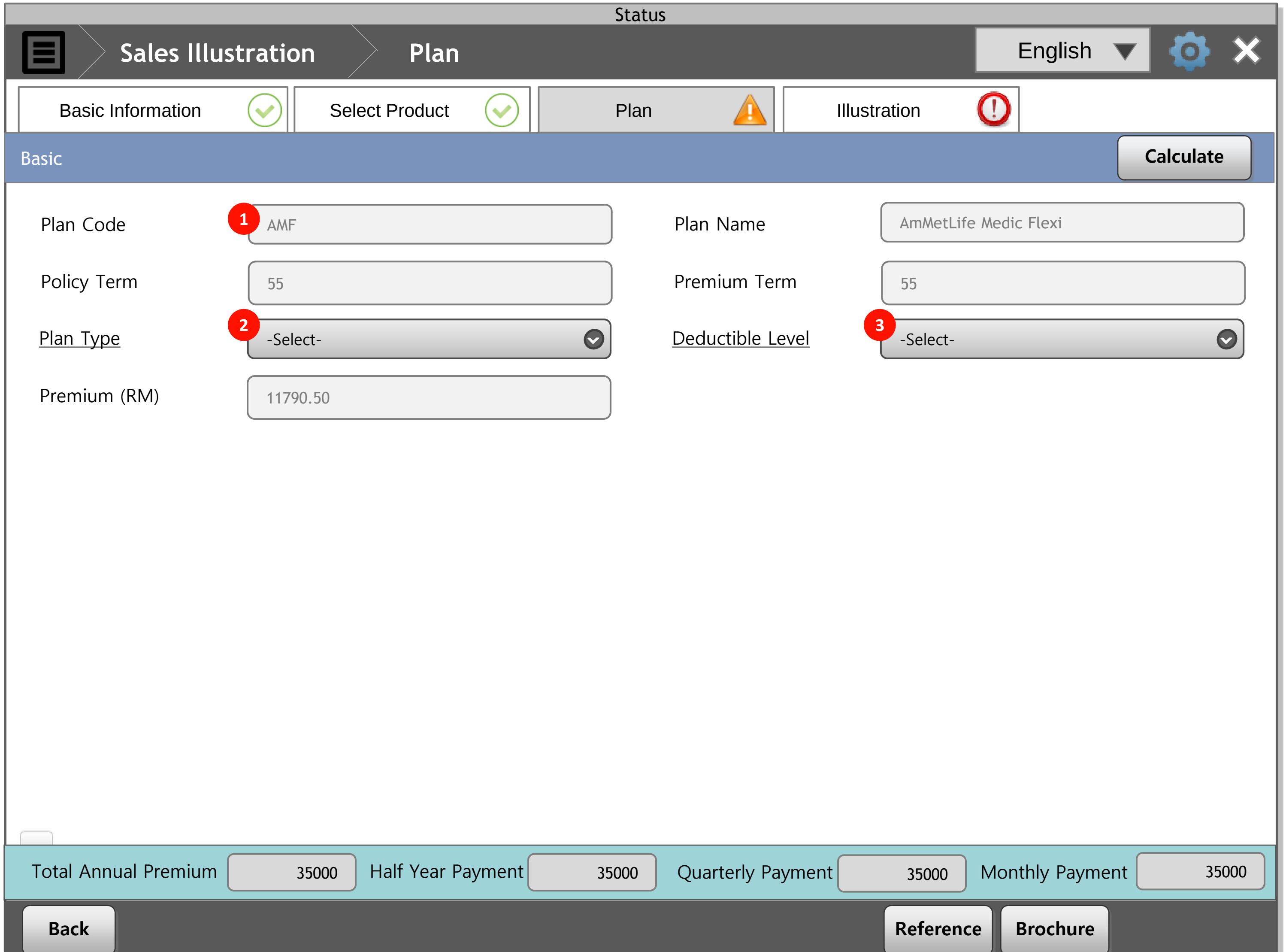


Description	
1	[Basic Plan] Dropdown: • Plan1, Plan2, Plan3, Plan4

Plan – AmMetLife Medic Flexi

6. Sales Illustration

6.3 Plan – AmMetLife Medic Flexi



Description	
1	[Plan Code] Text Input: • Plan code is depend on Basic Plan selected: • If Plan 1, plan code is AMF1 • If Plan 2, plan code is AMF2 • If Plan 3, plan code is AMF3 • If Plan 4, plan code is AMF4
2	[Plan Type] Dropdown: • Plan1, Plan2, Plan3, Plan4 • Plan 1 (may choose deductible level from 0, 2000, 5000, 10000, 15000) • Plan 2 (may choose deductible level from 0, 2000, 5000, 10000, 15000, 30000, 50000) • Plan 3 (may choose deductible level from 0, 2000, 5000, 10000, 15000, 30000, 50000) • Plan 4 (may choose deductible level from 0, 2000, 5000, 10000, 15000, 30000, 50000)
3	[Deductible Level] Dropdown: • 0, 2000, 5000, 10000, 15000, 30000, 50000 • List changes based on Plan Type

6. Illustration

6.4 Illustration - Table

Status

Sales Illustration | Plan | English | ✕

Basic Information | Select Product | Plan | Illustration

View Graph 1

Illustration ID : I0000000000004

Illustration Details

Summary Information

Name of Product : MetLife Lifestage Cover Whole Life Plan (USD) (B70)

Proposed Insured Name : FeedEdcercer(Aged 35, Male, Non-smoker)

Table View

End of Policy Year	Accumulated Cash Value			Life Benefit		Total Premium Paid
	Guaranteed Cash Value	Dividend (Non-Guaranteed)	Total Cash Value	Guaranteed	Total Life Benefit	
1	0	7	7	225,000	225,007	6,620.85
2	0	29	29	225,000	225,029	13,241.70
3	2,307	66	2,373	225,000	225,066	19,862.55
4	3,748	120	3,868	225,000	225,120	26,483.40
5	4,698	178	4,876	225,000	225,178	26,483.40
6	5,724	239	5,963	225,000	225,239	26,483.40
7	5,975	304	6,279	225,000	225,304	26,483.40
8	6,236	373	6,609	225,000	225,373	26,483.40
9	6,507	446	6,953	225,000	225,446	26,483.40
10	6,789	524	7,313	225,000	225,524	26,483.40

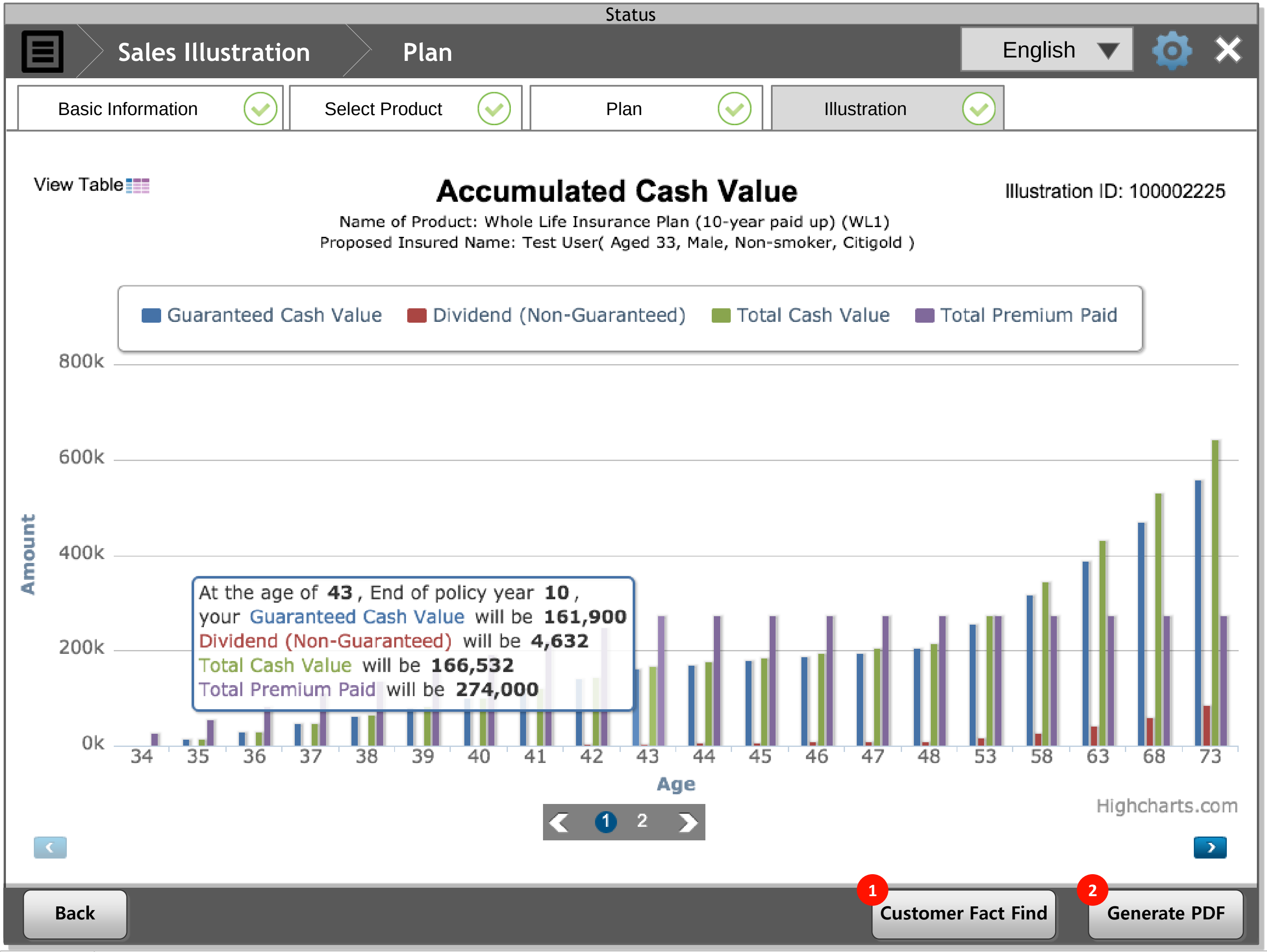
Scroll able

Back | Generate PDF

Description	
*	show table first before showing the graph. 2 tables will be shown. Default 30 years and the maturity year selected.
	[View Graph] Button: • Showing the graph.

6. Illustration

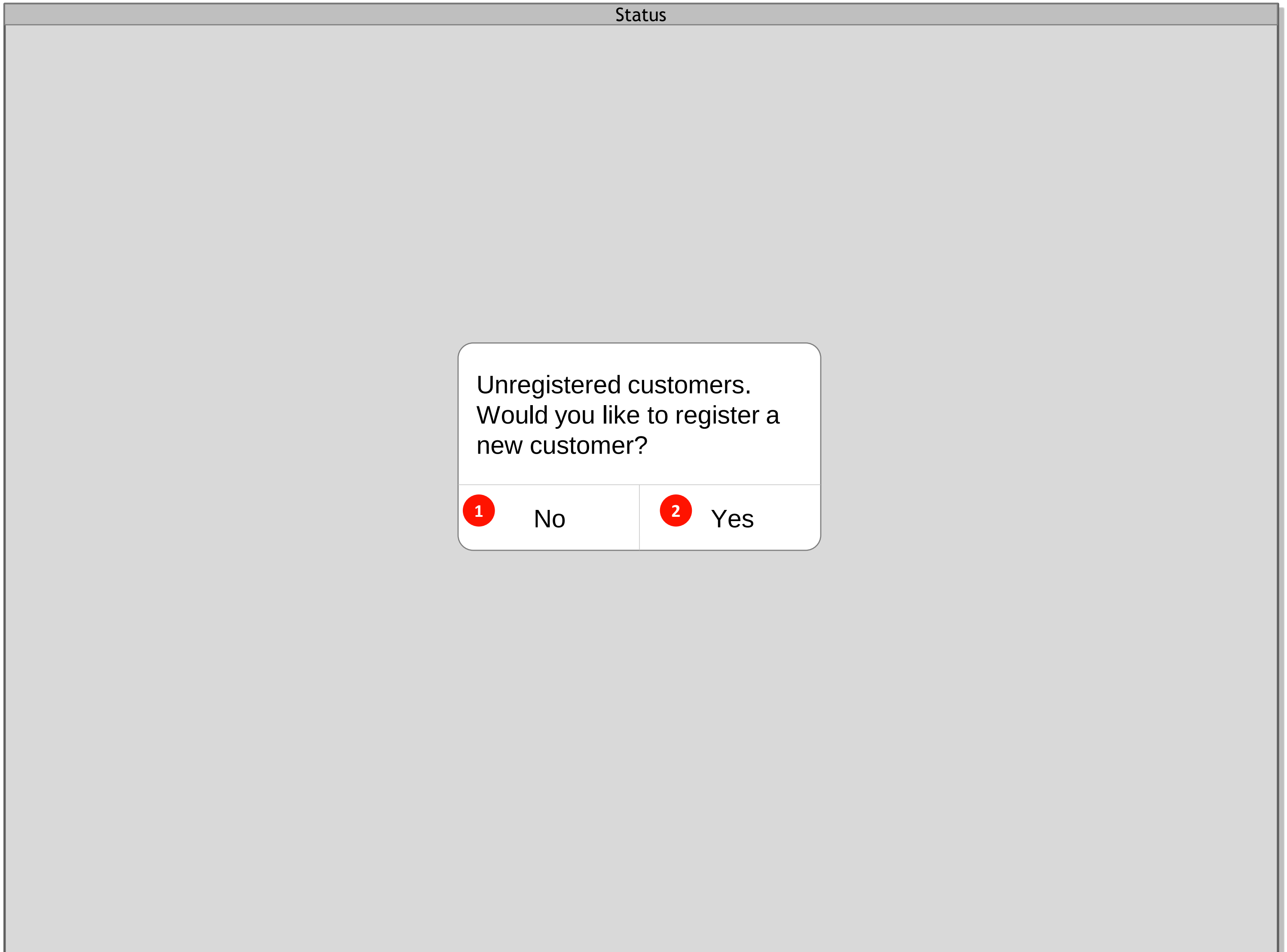
6.4 Illustration - Graph



	Description
*	Similar to MetLife Hong Kong tab. Able to view graph and table but require discussion on which program will be used to view the graph and table. Existing graph uses Highcharts.
1	[Customer Fact Find] Button: • Defualt:hide • Generate PDF button is cliecked and viewed • Go to CFFF
2	[Generate] Button: • After SIS PDF generation, go to pdf viewer

6. Illustration

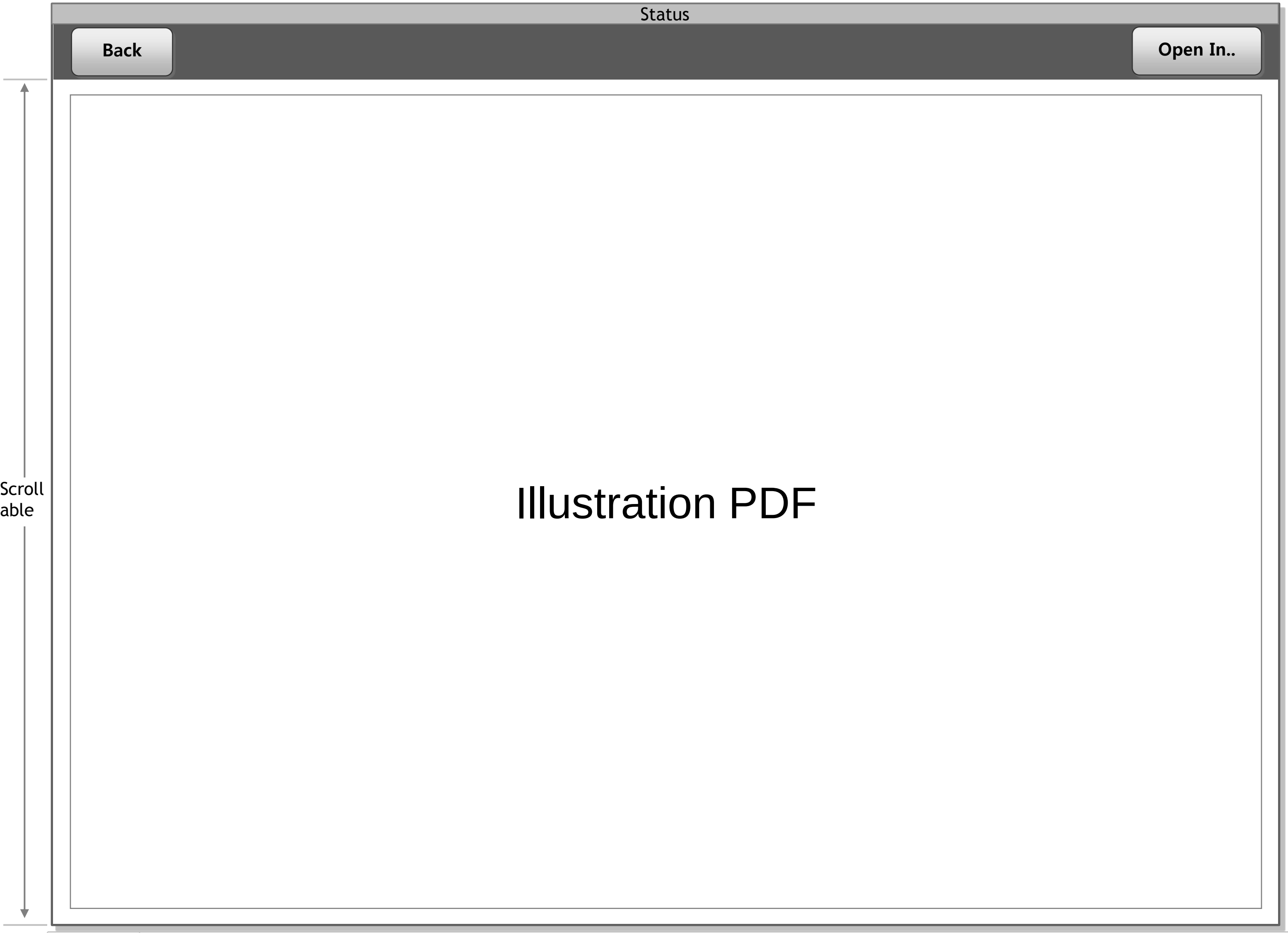
6.4 Illustration – If client is unregistered



	Description
*	• Ask to register customer.
1	• If no, client is not registered.
2	• If yes, client is registered and make new profile that linked to this SIS.

6. Illustration

6.5 Illustration PDF



Description	
*	Equivalent to the existing project screen. Able to send generated PDF via email.