Columbus Life's Illustration Systems

Quick Start Guide

LIFE PRODUCTS

Columbus Life Insurance Company

A member of Western & Southern Financial Group

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Not for use with the public.

CL 5.2067-Life-LP (04/20)


Columbus Life
Insurance Company
Discover What Matters
Discover our product design, history of commitment, technology solutions and our approach to serving independent producers like you.
DESIGN
COMMITMENT
TECHNOLOGY
SUPPORT
Welcome to Columbus Life's Extranet for Financial Professionals
Supporting independent producers has been a hallmark of Columbus Life's success for more than 100 years. We deliver solutions that work for you and your clients. Find out how we can help you explore new heights.
For more information about joining Columbus Life call 1-866-299-8715 or visit Become a Producer to learn more.
Contact our Sales Desk
Monday – Thursday
8 am – 5:45 pm EST
Friday
8 am – 4:45 pm EST
1-800-677-9696, OPT 4
Email
Producer Login
User ID
*Password
Forgot Password / First-Time User?
Guest Login
*Password must be between 8 and 64 characters in length and must contain 1 uppercase character, 1 lowercase character, 1 numeral and 1 special character.
LOGIN

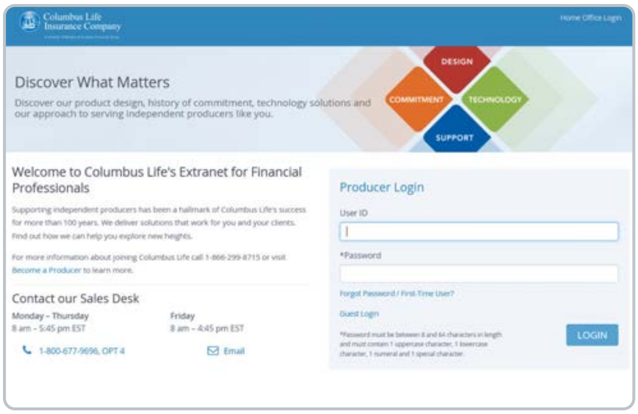
Life Products Illustration

This guide will provide you with simple instructions to get a "Quick Start" using our life products illustration software. The software is available on the web and desktop. Both will synchronize your data regardless of your method of entry.

For detailed training, contact the Sales Desk at **800.677.9696, Option 4.**

Getting Started

- To get to the Illustrations page, go to the Producer Extranet **agency.columbuslife.com** and log in.[1]

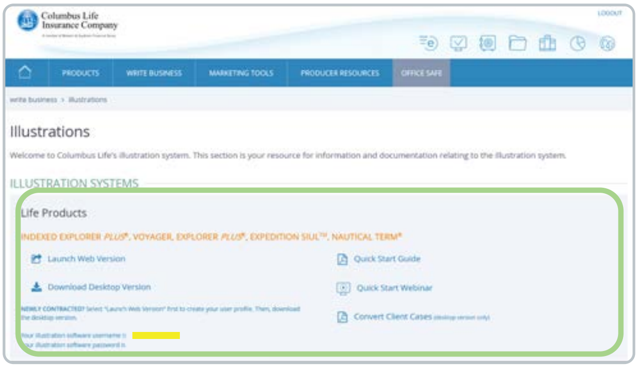


- Click **Write Business** and then **Illustrations**.

- For web-based version: click **Launch Web Version**. The life products illustration system opens.

- For desktop version: The system generates a unique password for each user to access the desktop. Record this password and click **Download Desktop Version**. Follow the prompts to download the software.

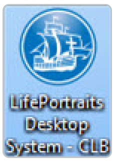
  - Note: Newly contracted producers must select "Launch Web Version" to set up a user profile before downloading the desktop version.

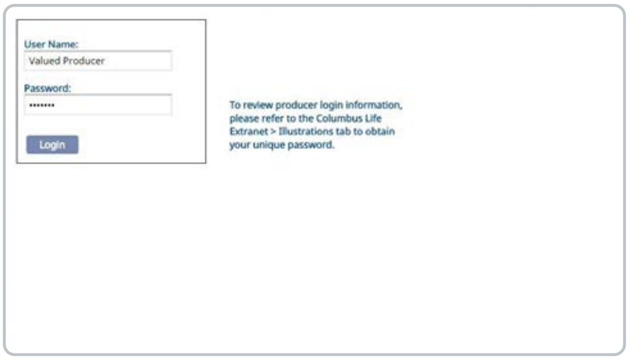


1 Your User ID is typically the last 5 digits of your producer number. Need assistance logging in? Contact the Sales Desk at 800.677.9696, Option 4.

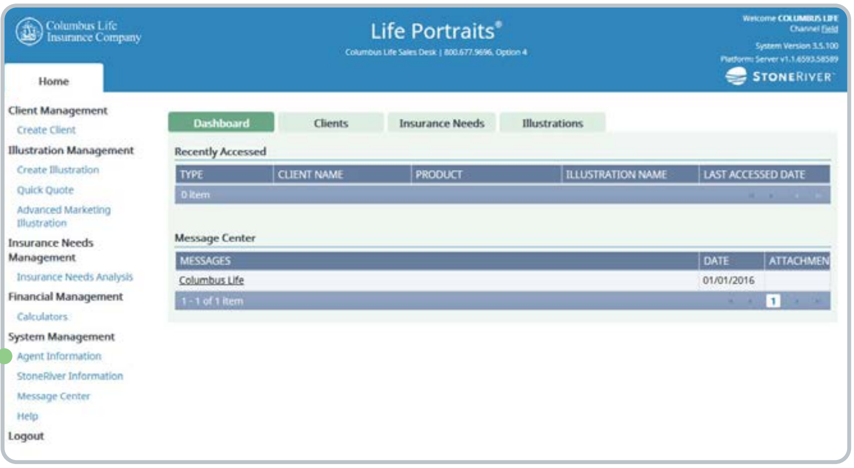
Setting Up the Desktop Version

- Once you successfully install the software, the Columbus Life LP icon will appear on your desktop.
- Double click the icon to open the desktop software.
- Enter your login credentials to access the software.
  - Username—Producer Number.
  - Password—This is the unique password generated for you in the previous step—located on the Illustrations page of the Columbus Life Extranet.

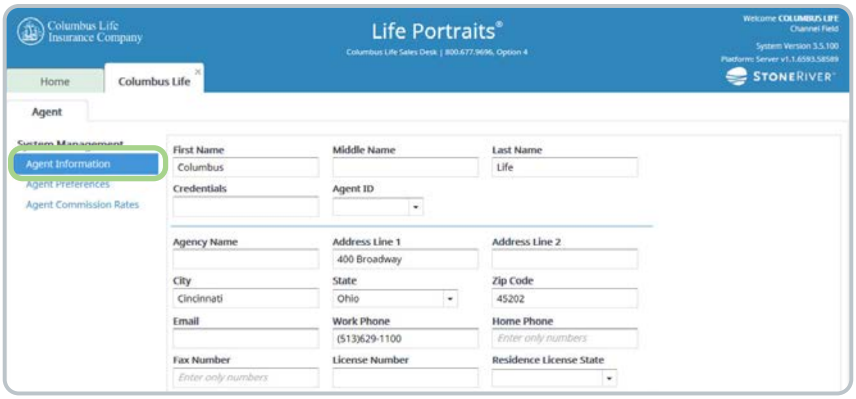


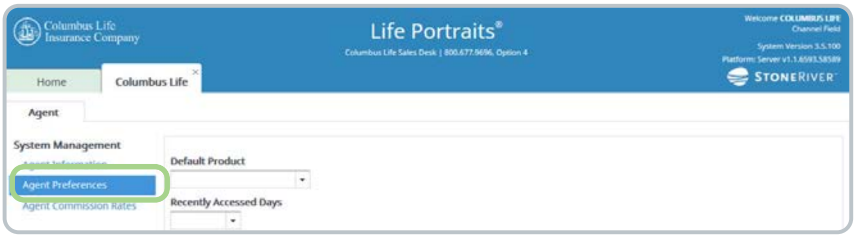


Please verify that your agent name and channel are correct. In the left navigation bar under Home > System Management, click **Agent Information.**

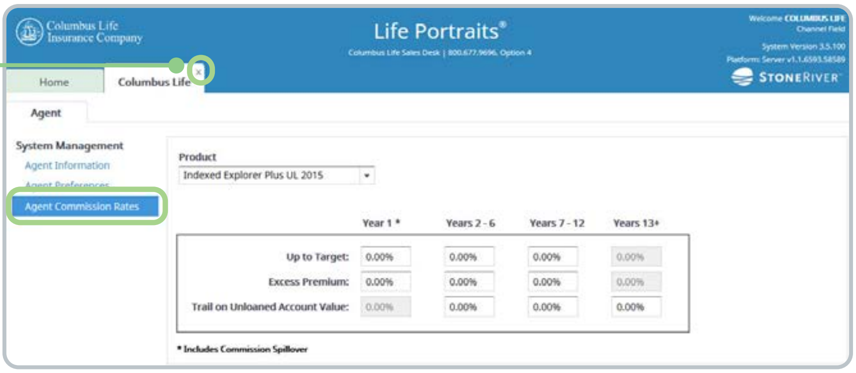


Under the Agent tab, you can update your Agent Information, Preferences and Commission Rates by clicking on the links on the left navigation bar.





To close this window, click the "x."

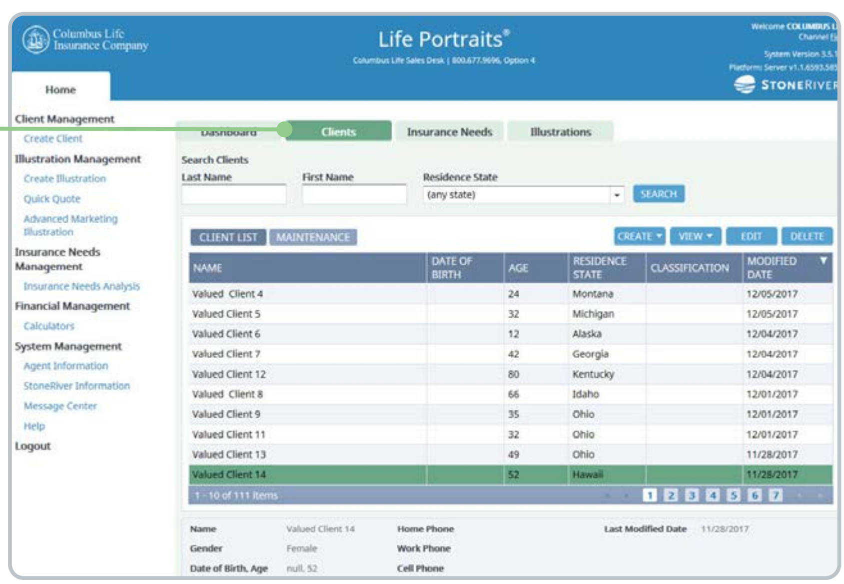


Navigating the Homepage

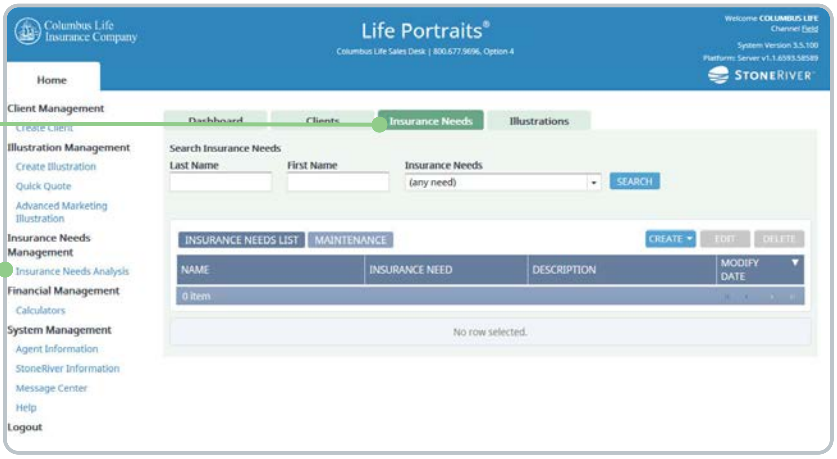
You can access your illustrations and search for specific clients or cases several ways on the homepage, using the Dashboard, Clients, Insurance Needs and Illustration tabs

The **Dashboard** tab will display your recently accessed illustrations.

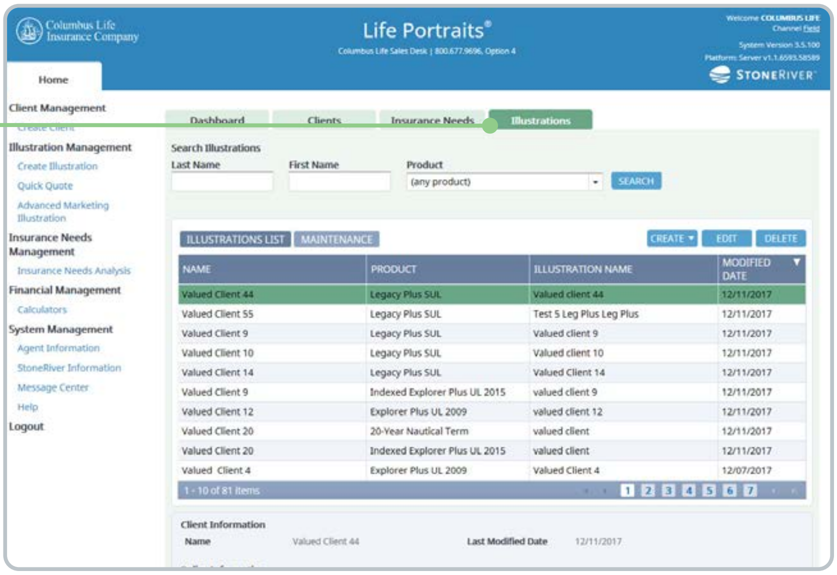
The **Clients** tab will give you access to search all illustrations by client name.



The **Insurance Needs** tab will give you access to your recently created insurance needs analysis. These reports can be created by clicking **Insurance Needs Analysis** on the left navigation bar.

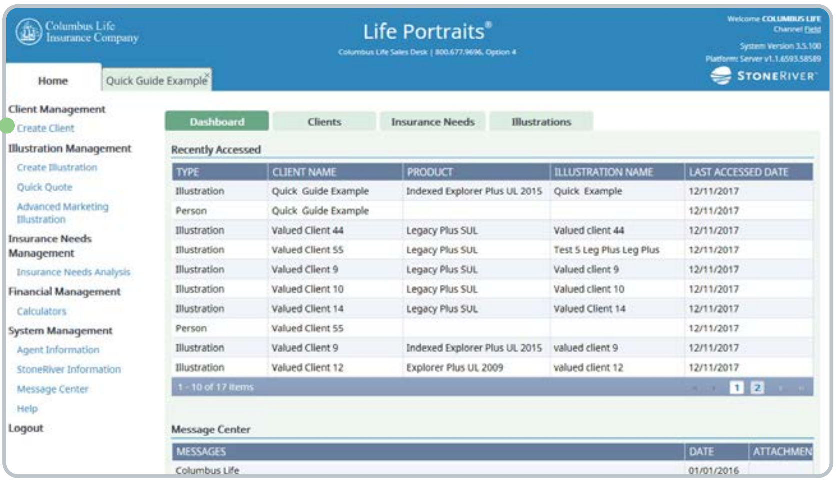


The **Illustrations** tab will give you access to search created illustrations by name, product or illustration name.



Setting Up Your Client and Running an Illustration

Click **Create Client**

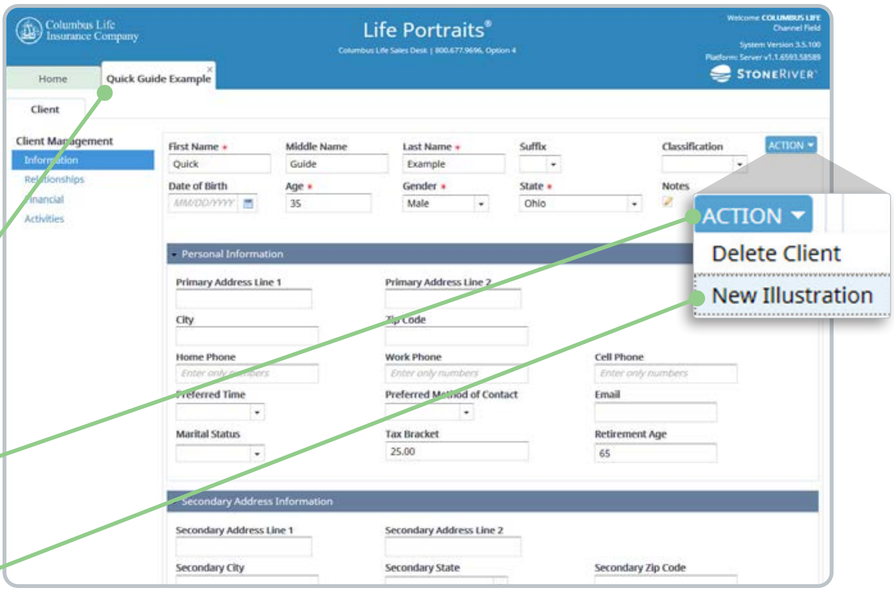


Enter your client's personal information and secondary information: First Name, Last Name, Age, Gender and State are required.

The client has now been added to your client base and can be found using the homepage search. In addition, the tab will change to the client's name.

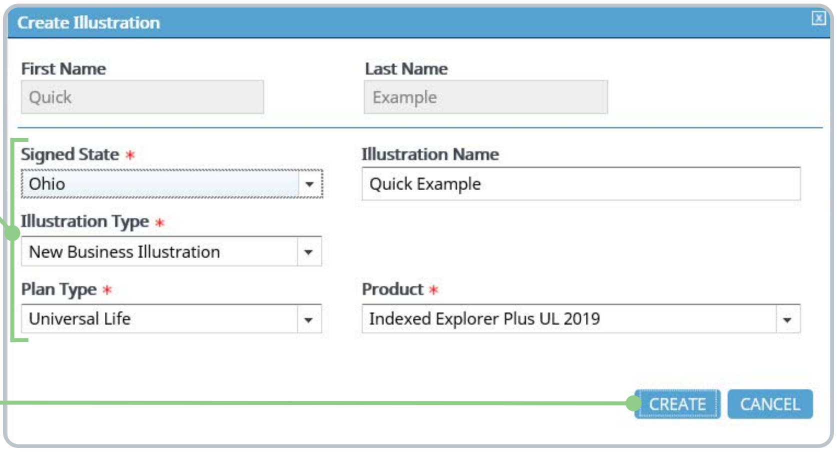
Click **Action** to begin an illustration.

Click **New Illustration**

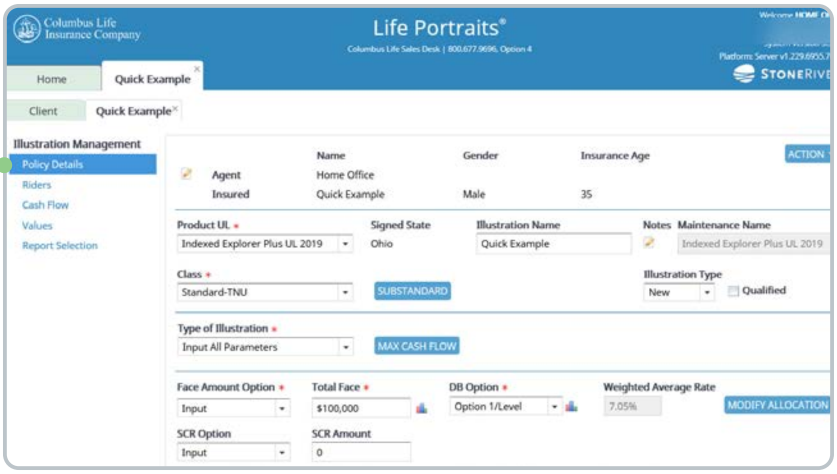


Select the state, illustration type, plan type and product.

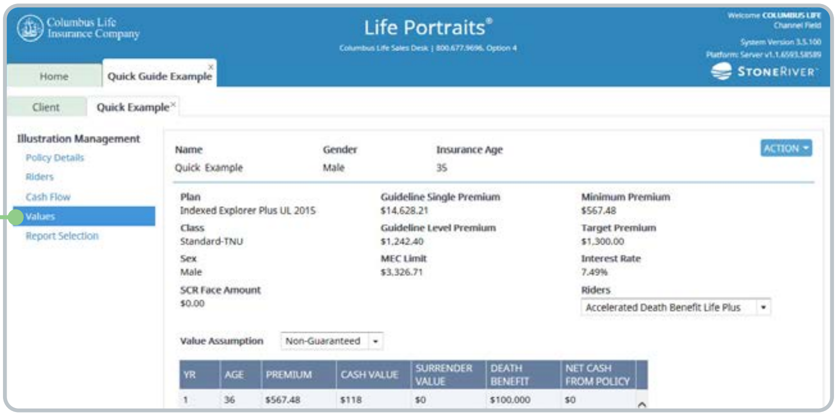
Click **Create.**



Complete the inputs on the Policy Details tab. Use the left navigation pane to input Riders, add Cash Flow details, view Values and select Reports to add to the illustration. Cash flow options can be input directly from the Policy Details screen. Additional details for Cash Flow options can be input on the Cash Flow tab.

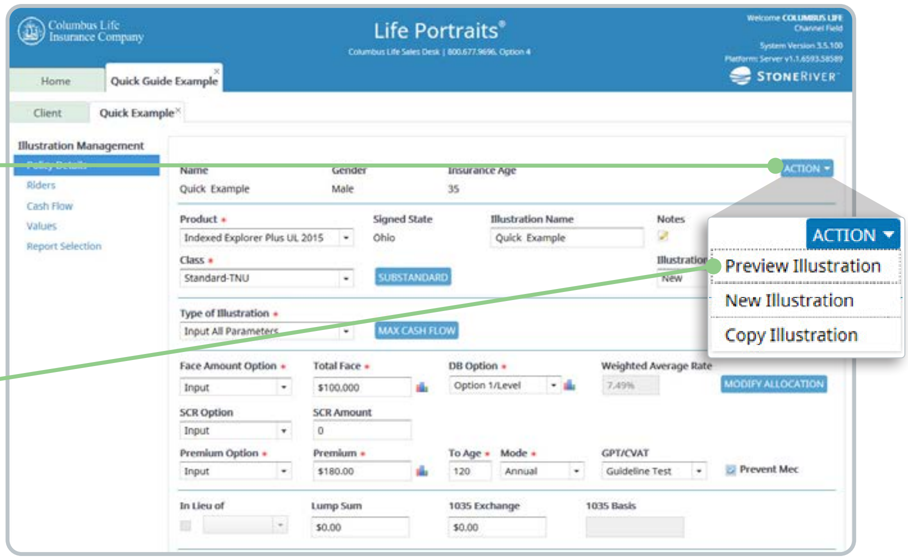


The **Values** screen provides a grid view of the values only.



Once completed, click **Action** to preview, create a new or copy the illustration from any "illustration management" option.

The **Preview Illustration** command provides the actual full illustration in a PDF format that can be provided to the customer.

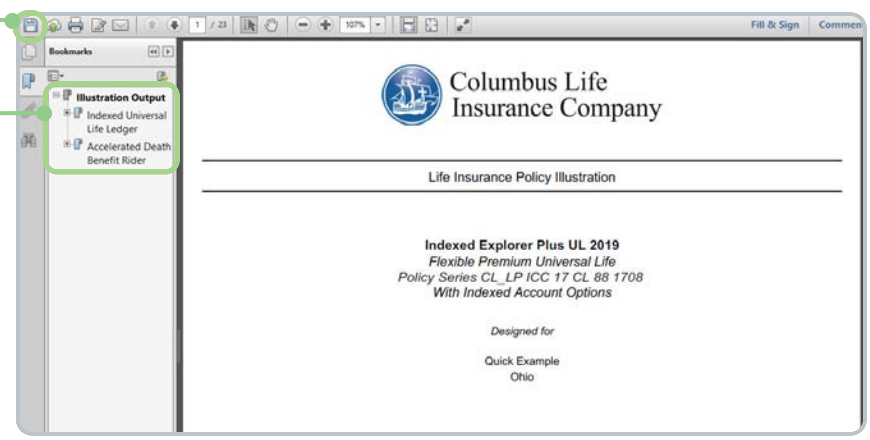


To save the full illustration, including the supplement and rider pages, **click the blue disk.**

To view supplement pages, **click the supplement report** on the left navigation bar.

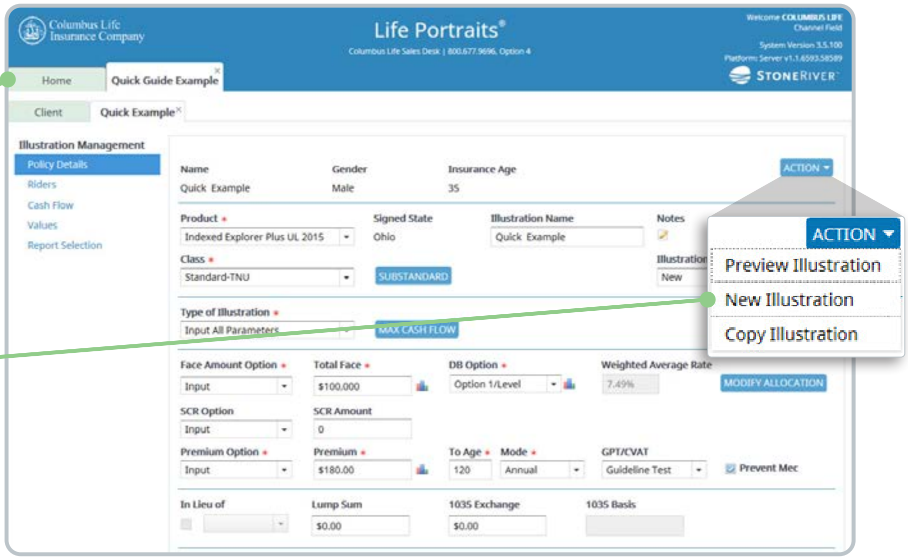
To return to the software, click **the red x.**

The illustration you created will be automatically saved to your dashboard, as will each additional client or illustration you create.

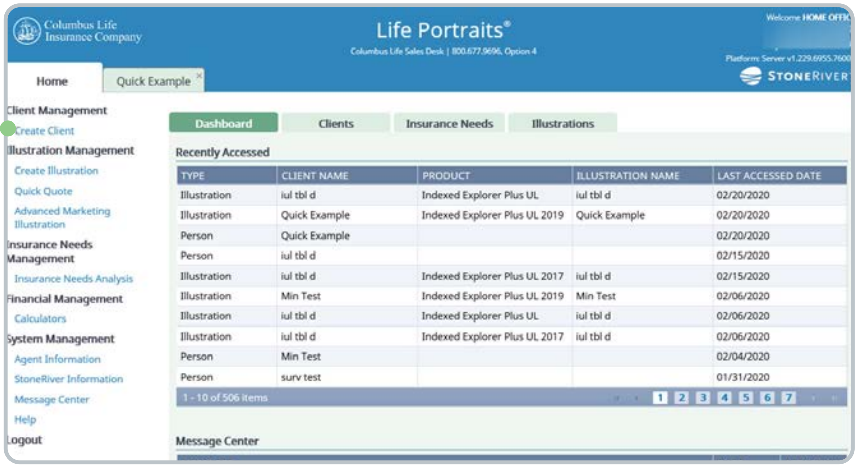


To begin an illustration for a new client, click the **Home** tab.

To begin a new illustration with the same client, click **Action** and select **New Illustration.**

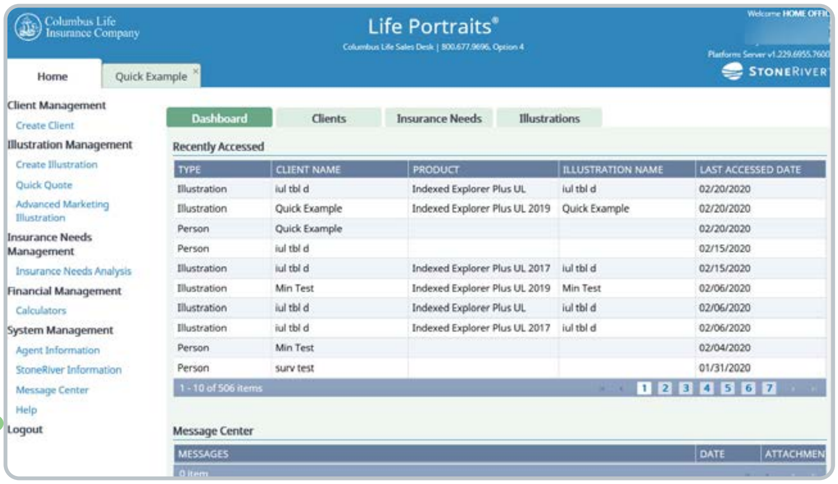


Once on the home page, click **Create Client** and follow the steps outlined previously.



Closing the Software

To close the software, click **Logout.**



Have Questions?

If you have any questions about this illustration system, please contact the Columbus Life Sales Desk at 800.677.9696, Option 4.

Notes

Product and Sales Support:

800.677.9696, Option 4

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Life insurance products are not bank products, are not a deposit, are not insured by the FDIC, nor any other federal entity, have no bank guarantee and may lose value.

Payment of the benefits of Columbus Life Insurance Company life insurance products is backed by the full financial strength of Columbus Life Insurance Company, Cincinnati, Ohio. Guarantees are based on the claims-paying ability of the insurer.

Product and rider provisions, availability, definitions, and benefits may vary by state.

Columbus Life Insurance Company is licensed in the District of Columbia and all states except New York.