



# Columbus Life's Illustration Systems

*Quick Start Guide*

## LIFE PRODUCTS



**Columbus Life  
Insurance Company**

A member of Western & Southern Financial Group



## Discover What Matters

Discover our product design, history of commitment, technology solutions and our approach to serving independent producers like you.



## 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



### 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

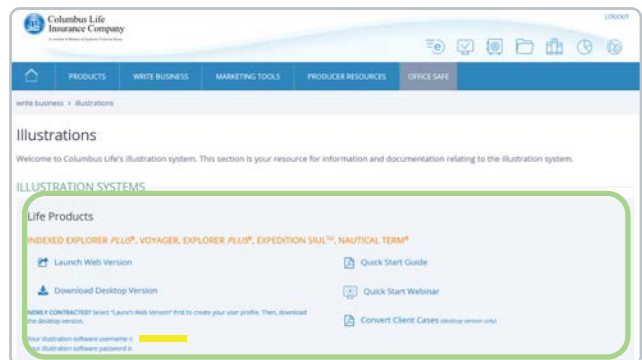
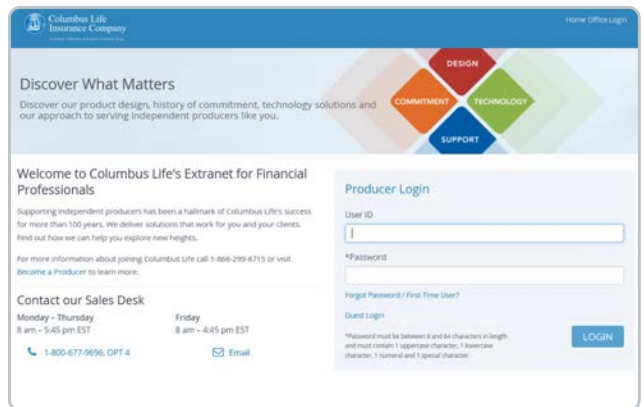
## Life Products Illustration

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](tel:800.677.9696), **Option 4**.

## Getting Started

- To get to the Illustrations page, go to the Producer Extranet [agency.columbuslife.com](http://agency.columbuslife.com) and log in.<sup>1</sup>
- 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.



<sup>1</sup> 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.



User Name:  
Valued Producer

Password:  
\*\*\*\*\*

Login

To review producer login information, please refer to the Columbus Life Extranet > Illustrations tab to obtain your unique password.

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

The screenshot shows the Life Portraits dashboard. The left navigation bar is expanded to 'System Management', where 'Agent Information' is highlighted. The main content area shows a 'Recently Accessed' table with the following data:

TYPE	CLIENT NAME	PRODUCT	ILLUSTRATION NAME	LAST ACCESSED DATE
D Item				

Below the table is a 'Message Center' section with a table showing one message:

MESSAGES	DATE	ATTACHMEN
Columbus Life	01/01/2016	

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

The screenshot shows the 'Agent' information form. The left navigation bar is expanded to 'System Management', where 'Agent Information' is highlighted. The form contains the following fields:

- First Name: Columbus
- Middle Name: Life
- Last Name: Life
- Credentials: [Empty]
- Agent ID: [Empty]
- Agency Name: [Empty]
- Address Line 1: 400 Broadway
- Address Line 2: [Empty]
- City: Cincinnati
- State: Ohio
- Zip Code: 45202
- Email: [Empty]
- Work Phone: (513)629-1100
- Home Phone: [Empty]
- Fax Number: [Empty]
- License Number: [Empty]
- Residence License State: [Empty]

The screenshot shows the 'Agent Preferences' form. The left navigation bar is expanded to 'System Management', where 'Agent Preferences' is highlighted. The form contains the following fields:

- Default Product: [Empty]
- Recently Accessed Days: [Empty]

To close this window, click the "x."

The screenshot shows the 'Life Portraits' interface for Columbus Life Insurance Company. The 'Agent Commission Rates' section is highlighted with a green box. A callout box on the left points to the 'x' icon in the top right corner of the highlighted section.

	Year 1 *	Years 2 - 6	Years 7 - 12	Years 13+
Up to Target:	0.00%	0.00%	0.00%	0.00%
Excess Premium:	0.00%	0.00%	0.00%	0.00%
Trail on Unloaned Account Value:	0.00%	0.00%	0.00%	0.00%

\* Includes Commission Spillover

## 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 screenshot shows the 'Life Portraits' application interface with the 'Dashboard' tab selected. The left sidebar contains navigation options like 'Client Management', 'Illustration Management', 'Insurance Needs Management', 'Financial Management', and 'System Management'. The main content area displays a table titled 'Recently Accessed' with the following data:

TYPE	CLIENT NAME	PRODUCT	ILLUSTRATION NAME	LAST ACCESSED DATE
Illustration	Quick Guide Example	Indexed Explorer Plus UL 2015	Quick Example	12/11/2017
Person	Quick Guide Example			12/11/2017
Illustration	Valued Client 44	Legacy Plus SUL	Valued client 44	12/11/2017
Illustration	Valued Client 55	Legacy Plus SUL	Test 5 Leg Plus Leg Plus	12/11/2017
Illustration	Valued Client 9	Legacy Plus SUL	Valued client 9	12/11/2017
Illustration	Valued Client 10	Legacy Plus SUL	Valued client 10	12/11/2017
Illustration	Valued Client 14	Legacy Plus SUL	Valued Client 14	12/11/2017
Person	Valued Client 55			12/11/2017
Illustration	Valued Client 9	Indexed Explorer Plus UL 2015	valued client 9	12/11/2017
Illustration	Valued Client 12	Explorer Plus UL 2009	valued client 12	12/11/2017

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

The screenshot shows the 'Life Portraits' application interface with the 'Clients' tab selected. The left sidebar is the same as in the previous screenshot. The main content area features a search interface with fields for 'Last Name', 'First Name', and 'Residence State'. Below the search fields is a table titled 'CLIENT LIST' with the following data:

NAME	DATE OF BIRTH	AGE	RESIDENCE STATE	CLASSIFICATION	MODIFIED DATE
Valued Client 4		24	Montana		12/05/2017
Valued Client 5		32	Michigan		12/05/2017
Valued Client 6		12	Alaska		12/04/2017
Valued Client 7		42	Georgia		12/04/2017
Valued Client 12		80	Kentucky		12/04/2017
Valued Client 8		66	Idaho		12/01/2017
Valued Client 9		35	Ohio		12/01/2017
Valued Client 11		32	Ohio		12/01/2017
Valued Client 13		49	Ohio		11/28/2017
Valued Client 14		52	Hawaii		11/28/2017

Below the table, there is a summary for 'Valued Client 14':

Name: Valued Client 14      Home Phone:      Last Modified Date: 11/28/2017  
 Gender: Female      Work Phone:  
 Date of Birth, Age: null, 52      Cell Phone:



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.

**Life Portraits®**  
Columbus Life Sales Desk | 800.677.9696, Option 4

Welcome COLUMBUS LIFE Channel Edm  
System Version: 3.5.100  
Platform Server: v1.3.0993.50109  
STONERIVER

Home

Client Management  
Create Client

Illustration Management  
Create Illustration  
Quick Quote  
Advanced Marketing Illustration

**Insurance Needs Management**  
Insurance Needs Analysis

Financial Management  
Calculators

System Management  
Agent Information  
StoneRiver Information  
Message Center  
Help  
Logout

Dashboard Clients **Insurance Needs** Illustrations

Search Insurance Needs  
Last Name First Name Insurance Needs (any need) SEARCH

INSURANCE NEEDS LIST MAINTENANCE CREATE EDIT DELETE

NAME	INSURANCE NEED	DESCRIPTION	MODIFIED DATE
0 Item			

No row selected.

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

**Life Portraits®**  
Columbus Life Sales Desk | 800.677.9696, Option 4

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Calculators

System Management  
Agent Information  
StoneRiver Information  
Message Center  
Help  
Logout

Dashboard Clients Insurance Needs **Illustrations**

Search Illustrations  
Last Name First Name Product (any product) SEARCH

ILLUSTRATIONS LIST MAINTENANCE CREATE EDIT DELETE

NAME	PRODUCT	ILLUSTRATION NAME	MODIFIED DATE
Valued Client 44	Legacy Plus SUL	Valued client 44	12/11/2017
Valued Client 55	Legacy Plus SUL	Test 5 Leg Plus Leg Plus	12/11/2017
Valued Client 9	Legacy Plus SUL	valued client 9	12/11/2017
Valued Client 10	Legacy Plus SUL	valued client 10	12/11/2017
Valued Client 14	Legacy Plus SUL	valued client 14	12/11/2017
Valued Client 9	Indexed Explorer Plus UL 2015	valued client 9	12/11/2017
Valued Client 12	Explorer Plus UL 2009	valued client 12	12/11/2017
Valued Client 20	20-Year Nautical Term	valued client	12/11/2017
Valued Client 20	Indexed Explorer Plus UL 2015	valued client	12/11/2017
Valued Client 4	Explorer Plus UL 2009	Valued Client 4	12/07/2017

1 - 10 of 81 items

Client Information  
Name Valued Client 44 Last Modified Date 12/11/2017

## Setting Up Your Client and Running an Illustration

Click **Create Client**

The screenshot shows the Life Portraits dashboard. The left sidebar contains a 'Client Management' section with a 'Create Client' button highlighted. The main area displays a 'Recently Accessed' table with columns for TYPE, CLIENT NAME, PRODUCT, ILLUSTRATION NAME, and LAST ACCESSED DATE. The table lists several entries for 'Quick Guide Example' and 'Valued Client'.

TYPE	CLIENT NAME	PRODUCT	ILLUSTRATION NAME	LAST ACCESSED DATE
Illustration	Quick Guide Example	Indexed Explorer Plus UL 2015	Quick Example	12/11/2017
Person	Quick Guide Example			12/11/2017
Illustration	Valued Client 44	Legacy Plus SUL	Valued client 44	12/11/2017
Illustration	Valued Client 55	Legacy Plus SUL	Test 5 Leg Plus Leg Plus	12/11/2017
Illustration	Valued Client 9	Legacy Plus SUL	Valued client 9	12/11/2017
Illustration	Valued Client 10	Legacy Plus SUL	Valued client 10	12/11/2017
Illustration	Valued Client 14	Legacy Plus SUL	Valued Client 14	12/11/2017
Person	Valued Client 55			12/11/2017
Illustration	Valued Client 9	Indexed Explorer Plus UL 2015	valued client 9	12/11/2017
Illustration	Valued Client 12	Explorer Plus UL 2009	valued client 12	12/11/2017

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**

The screenshot shows the client information form. The 'Client' tab is selected. The form includes fields for First Name (Quick), Middle Name (Guide), Last Name (Example), Suffix, Classification, Date of Birth (MM/DD/YYYY), Age (35), Gender (Male), State (Ohio), Home Phone, Work Phone, Cell Phone, Preferred Time, Preferred Method of Contact, Marital Status, Tax Bracket (25.00), Retirement Age (65), and Secondary Address Information. A callout box highlights the 'ACTION' dropdown menu, which contains 'Delete Client' and 'New Illustration' options.

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.

YR	AGE	PREMIUM	CASH VALUE	SURRENDER VALUE	DEATH BENEFIT	NET CASH FROM POLICY
1	36	\$567.48	\$118	\$0	\$100,000	\$0

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

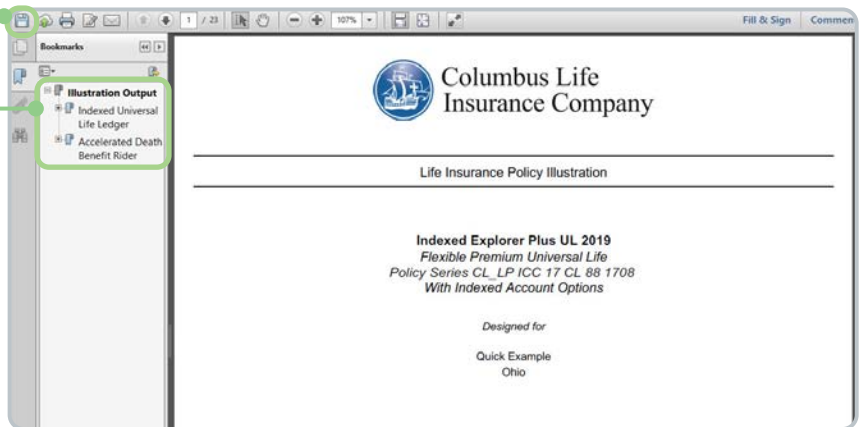
The **Preview Illustration** command provides the actual full illustration in a PDF format that can be provided to the customer.

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.

TYPE	CLIENT NAME	PRODUCT	ILLUSTRATION NAME	LAST ACCESSED DATE
Illustration	iul tbi d	Indexed Explorer Plus UL	iul tbi d	02/20/2020
Illustration	Quick Example	Indexed Explorer Plus UL 2019	Quick Example	02/20/2020
Person	Quick Example			02/20/2020
Person	iul tbi d			02/15/2020
Illustration	iul tbi d	Indexed Explorer Plus UL 2017	iul tbi d	02/15/2020
Illustration	Min Test	Indexed Explorer Plus UL 2019	Min Test	02/06/2020
Illustration	iul tbi d	Indexed Explorer Plus UL	iul tbi d	02/06/2020
Illustration	iul tbi d	Indexed Explorer Plus UL 2017	iul tbi d	02/06/2020
Person	Min Test			02/04/2020
Person	surv test			01/31/2020

## Closing the Software

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

The screenshot shows the 'Life Portraits' software interface. The top navigation bar includes the Columbus Life Insurance Company logo, the title 'Life Portraits', and the text 'Columbus Life Sales Desk | 800.677.9696, Option 4'. The left sidebar contains a navigation menu with the following items: Client Management (Create Client), Illustration Management (Create Illustration, Quick Quote, Advanced Marketing Illustration), Insurance Needs Management (Insurance Needs Analysis), Financial Management (Calculators), System Management (Agent Information, StoneRiver Information, Message Center, Help), and Logout. The main content area has tabs for Dashboard, Clients, Insurance Needs, and Illustrations. The 'Recently Accessed' table is as follows:

TYPE	CLIENT NAME	PRODUCT	ILLUSTRATION NAME	LAST ACCESSED DATE
Illustration	iul tbi d	Indexed Explorer Plus UL	iul tbi d	02/20/2020
Illustration	Quick Example	Indexed Explorer Plus UL 2019	Quick Example	02/20/2020
Person	Quick Example			02/20/2020
Person	iul tbi d			02/15/2020
Illustration	iul tbi d	Indexed Explorer Plus UL 2017	iul tbi d	02/15/2020
Illustration	Min Test	Indexed Explorer Plus UL 2019	Min Test	02/06/2020
Illustration	iul tbi d	Indexed Explorer Plus UL	iul tbi d	02/06/2020
Illustration	iul tbi d	Indexed Explorer Plus UL 2017	iul tbi d	02/06/2020
Person	Min Test			02/04/2020
Person	surv test			01/31/2020

Below the table is a 'Message Center' section with columns for MESSAGES, DATE, and ATTACHMENT. The interface also shows a pagination control for the table: '1 - 10 of 506 items' and a set of numbered buttons (1-7).

### Have Questions?

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



Product and Sales Support:  
800.677.9696, Option 4



Columbus Life  
Insurance Company

A member of Western & Southern Financial Group

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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.

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