

# SYMETRA PROTECTOR TERM LIFE INSURANCE SERIES

## TIPS FOR USING PROTECTOR TERM SOFTWARE

### Getting Started:

The screenshot shows the SYMETRA PROTECTOR software interface. The 'Producer' information form is displayed, with fields for First Name (John), Last Name (Smith), Business Name, Address Line 1 (Beech Road), Address Line 2, City (Edmonds), State (Washington), ZIP (98000), Phone Number (509-555-5555), Fax Number, and E-mail.

### When Generating Reports:

The screenshot shows the SYMETRA PROTECTOR software interface with the 'Policy Options' and 'Incurred' information forms. The 'Policy Options' form includes fields for Premium Guarantee Option (Full Term Guarantee, Partial Term Guarantee) and Proposal Effective Date (January 9, 2009). The 'Incurred' form includes fields for First Name (John), Last Name (Smith), Gender (Male, Female), Age (Current Age: 45), Birth Date (January 9, 1964), State (Washington), and Rate Class (Non-Nicotine). A 'Generate Proposal' button is visible at the bottom.

#### A. Set personal default proposal State:

- 1) In the upper right click "Preferences".
- 2) In the Illustration section, select your Proposal State from the drop down list.
- 3) Click "OK".

*Note: If application state is different than default set-up, simply override selection on the proposal input screen.*

#### B. Set personal default producer information:

- 1) The Home page shows pre-set producer information. Re-type each field to input your own Producer name and details. This information will be retained and the Producer Name, Address and Phone will appear automatically on each proposal generated.

*Note: If on a selected proposal you want to indicate a different producer, you can override and input a "one time" update on the Reports Page.*

#### C. From this screen, run a new proposal by clicking "New Proposal" in the left Navigation.

After inputting your client and coverage information, you can generate your proposal from the Reports Page, listed in the left navigation area of your screen. You can also generate a proposal by using the "Generate Proposal" button at the bottom of each screen.

Please note that if you have not input client and coverage information, your proposal will only show pre-set information.

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