



**AGENT SUPPORT GROUP**  
A Member of Lifemark Partners

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New York City  
Long Island  
Westchester

# SmartView For Advisors

## IMPORTANT NOTICE REGARDING OUR FIRST VERSION OF SMARTVIEW FOR ADVISORS:

As soon as you sign on to SmartView you will automatically see your Case List window.

Please note the following:

- Case statuses for Informal Applications are not available at this time.
- Monthly and Daily Benefit amounts for Long Term Care cannot be displayed on the Case List at this time.
- The Integrations listed to the left of the Case List are also not available at this time.

We are working on the above items and will notify you when they become available.

SmartView for Advisor | Powered by Ebix, Inc. - Windows Internet Explorer

https://mysmartoffice4.ez-data.com/pages/advisorview/index.html#holdings=all

File Edit View Favorites Tools Help

Case List | Change Password | Sign out  
Previous Case | Next Case  
John Doe | Wednesday, November 02, 2011

**Integrations**

- Labels - SmartLink
- LTC Quote
- Carrier Rankings
- Life Quote
- Illustration

**Pending Cases | Print List**

**Pending Case List**

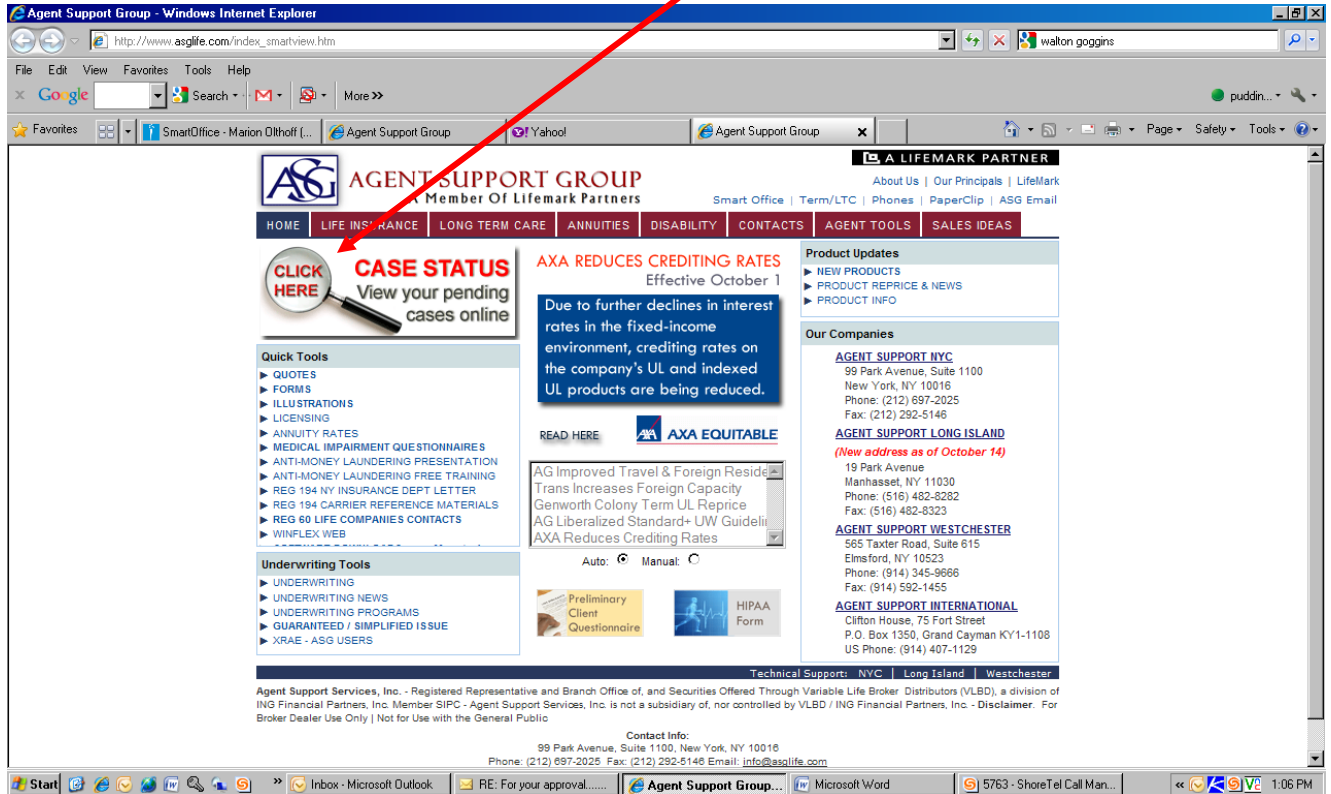
Contact Name	Policy #	Carrier Name	Product Name	Benefit	Status	Status Date	Case Manager E-Mail
<b>Holding Type: Annuity (2 Pending Cases)</b>							
<a href="#">Applebee, Caroline</a>	T00008	American General Life Insurance Company	AG Platinum Income Annuity		Submitted	10/25/2011	<a href="mailto:marion@asqlife.com">marion@asqlife.com</a>
<a href="#">Smith, Jane</a>	T00007	Companion Life Insurance Company	Corporate Annuity Solutions		Issued	10/25/2011	<a href="mailto:marion@asqlife.com">marion@asqlife.com</a>
<b>Holding Type: DI (1 Pending Case)</b>							
<a href="#">Applebee, Fred</a>	T00009	Principal Life Insurance Company	Disability Income Insurance (HH750)	9,000	Pending	10/25/2011	<a href="mailto:marion@asqlife.com">marion@asqlife.com</a>
<b>Holding Type: LTC (3 Pending Cases)</b>							
<a href="#">Smith, John</a>	LTC00003	Genworth Life Insurance Company Of New York	Privileged Choice - Shared Benefit		Approved	10/21/2011	<a href="mailto:marion@asqlife.com">marion@asqlife.com</a>
<a href="#">Smith, John</a>	LTC00001	Genworth Life Insurance Company Of New York	Privileged Choice		Pending	10/21/2011	<a href="mailto:marion@asqlife.com">marion@asqlife.com</a>
<a href="#">Smith, John</a>	LTC00002	Genworth Life Insurance Company Of New York	Privileged Choice - Shared Benefit		Pending	10/21/2011	<a href="mailto:marion@asqlife.com">marion@asqlife.com</a>
<b>Holding Type: Life (7 Pending Cases)</b>							
<a href="#">Applebee, Caroline</a>		Principal Life Insurance Company	Survivorship Universal Life (SUL)	10,000,000	Submitted	10/21/2011	<a href="mailto:marion@asqlife.com">marion@asqlife.com</a>

SmartView for Advisor | © 2000-2011 Ebix, Inc. Powered by EB CRM

Start | Microsoft Outlook | John Doe - Message (HT... | SmartView for Adviso... | Manual - SmartOffice For ... | 8:43 AM

## HOW TO LOG ON:

Go to the Agent Support Group web site at [www.asglife.com](http://www.asglife.com) and click on the magnifying glass in the upper left-hand corner of the window where it says "CLICK HERE". The "Sign in" dialog box will pop up.



## SIGN IN DIALOG BOX

- The Office Name will always be **asglife** (lower case letters)
- Type in your User Name and Password
- Click on the "Remember Me" checkbox so that the next time you log on you will only have to enter the password.
- Click on the "Sign in" button

**Please Sign In**

Office Name:

User Name:

Password:

Remember Me

## CHANGING YOUR PASSWORD

Once you have entered the user name and password provided by Agent Support Group for your first log on, SmartView will open and display your Case List. **For security purposes it is recommended that you change your password immediately after signing in to SmartView for the very first time.** Click on the “Change Password” hyperlink in the upper right hand corner of the SmartView window:

SmartView for Advisor | Powered by Ebix, Inc. - Windows Internet Explorer

https://mysmartoffice4.ez-data.com/pages/advisorview/index.html#holdings=all

File Edit View Favorites Tools Help

Google Search

Case List **Change Password** Sign out

John Doe | Tuesday, October 25, 2011

Integrations: Labels - SmartLink, LTC Quote, Carrier Rankings, Life Quote, Illustration

Pending Cases | Print List

**Pending Case List**

Contact Name	Policy #	Carrier Name	Product Name	Benefit	Status	Status Date	Case Manager E-Mail
<b>Holding Type: Annuity (2 Pending Cases)</b>							
Applebee, Caroline	T00008	American General Life Insurance Company	AG Platinum Income Annuity		Submitted	10/25/2011	marion@asolife.com
Smith, Jane	T00007	Companion Life Insurance Company	Corporate Annuity Solutions		Issued	10/25/2011	marion@asolife.com
<b>Holding Type: DI (1 Pending Case)</b>							
Applebee, Fred	T00009	Principal Life Insurance Company	Disability Income Insurance (HH750)	9,000	Pending	10/25/2011	marion@asolife.com
<b>Holding Type: LTC (3 Pending Cases)</b>							
Smith, John	LTC00003	Genworth Life Insurance Company Of New York	Privileged Choice - Shared Benefit		Approved	10/21/2011	marion@asolife.com
Smith, John	LTC00001	Genworth Life Insurance Company Of New York	Privileged Choice		Pending	10/21/2011	marion@asolife.com
Smith, John	LTC00002	Genworth Life Insurance Company Of New York	Privileged Choice - Shared Benefit		Pending	10/21/2011	marion@asolife.com
<b>Holding Type: Life (7 Pending Cases)</b>							

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A dialog box will open for you to enter and submit the new password. Click on the “Close” button when done:

SmartView for Advisor | Powered by Ebix, Inc. - Windows Internet Explorer

https://mysmartoffice4.ez-data.com/pages/advisorview/index.html#holdings=all

File Edit View Favorites Tools Help

Google Search

Case List Change Password Sign out

John Doe | Tuesday, October 25, 2011

Integrations: Labels - SmartLink, LTC Quote, Carrier Rankings, Life Quote, Illustration

Pending Cases | Print List

**Pending Case List**

Contact Name	Policy #	Carrier Name	Product Name	Benefit	Status	Status Date	Case Manager E-Mail
<b>Holding Type: Annuity (2 Pending Cases)</b>							
Applebee, Caroline	T00008	American General Life Insurance Company	AG Platinum Income Annuity		Submitted	10/25/2011	marion@asolife.com
Smith, Jane	T00007	Companion Life Insurance Company	Corporate Annuity Solutions		Issued	10/25/2011	marion@asolife.com
<b>Holding Type: DI (1 Pending Case)</b>							
Applebee, Fred	T00009	Principal Life Insurance Company	Disability Income Insurance (HH750)	9,000	Pending	10/25/2011	marion@asolife.com
<b>Holding Type: LTC (3 Pending Cases)</b>							
Smith, John	LTC00001	Genworth Life Insurance Company Of New York	Privileged Choice		Pending	10/21/2011	marion@asolife.com
Smith, John	LTC00003	Genworth Life Insurance Company Of New York	Privileged Choice - Shared Benefit		Approved	10/21/2011	marion@asolife.com
Smith, John	LTC00002	Genworth Life Insurance Company Of New York	Privileged Choice - Shared Benefit		Pending	10/21/2011	marion@asolife.com
<b>Holding Type: Life (7 Pending Cases)</b>							

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## VIEWING THE CASE LIST

Your case list is divided by Line Of Business (LOB or “Holding Type”). When you first sign on to SmartView, all of your cases will be displayed under their respective line of business: Annuity, DI, LTC, Life. To the left of the LOB title is a small box with a “minus” sign. You can click on that “minus” sign and collapse all of the cases under that LOB to hide them. Once you click on the box it will change into a “plus” sign which you can click on to display those cases again:

Click the “Plus” or “Minus” box to collapse or expand view of cases under a Holding Type (LOB)

Click on the client’s name to view a single case

Click on a case manager’s name to send an email regarding that case

Click to sign out of SmartView

Integrations  
Labels - SmartLink  
LTC Quote  
Carrier Rankings  
Life Quote  
Illustration

Pending Cases | Print List

Pending Case List

Contact Name	Policy #	Carrier Name	Product Name	Benefit	Status	Status Date	Case Manager E-Mail
[-] Holding Type: Annuity (2 Pending Cases)							
[-] Holding Type: DI (1 Pending Case)							
<a href="#">Applebee, Fred</a>	T00009	Principal Life Insurance Company	Disability Income Insurance (HH750)	9,000	Pending	10/25/2011	<a href="mailto:marion@asqlife.com">marion@asqlife.com</a>
[-] Holding Type: LTC (3 Pending Cases)							
<a href="#">Smith, John</a>	LTC00003	Genworth Life Insurance Company Of New York	Privileged Choice - Shared Benefit		Approved	10/21/2011	<a href="mailto:marion@asqlife.com">marion@asqlife.com</a>
<a href="#">Smith, John</a>	LTC00001	Genworth Life Insurance Company Of New York	Privileged Choice		Pending	10/21/2011	<a href="mailto:marion@asqlife.com">marion@asqlife.com</a>
<a href="#">Smith, John</a>	LTC00002	Genworth Life Insurance Company Of New York	Privileged Choice - Shared Benefit		Pending	10/21/2011	<a href="mailto:marion@asqlife.com">marion@asqlife.com</a>
[-] Holding Type: Life (7 Pending Cases)							

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## COLUMN HEADINGS

<b>CONTACT NAME:</b>	<i>Proposed Insured’s Name</i>
<b>POLICY #:</b>	<i>Will only be shown after the carrier has assigned the policy number</i>
<b>CARRIER NAME:</b>	<i>Insurance Company</i>
<b>PRODUCT NAME:</b>	<i>Plan of Insurance Applied For</i>
<b>BENEFIT:</b>	<i>Face amount (Life cases), Monthly Benefit Amount (DI cases)**</i>
<b>STATUS:</b>	<i>Pending, Approved, Delivered, etc.</i>
<b>STATUS DATE:</b>	<i>Date of last activity by the ASG case manager</i>
<b>CASE MANAGER:</b>	<i>The ASG case manager’s name</i>

\*\* LTC Monthly/Daily Benefit Amount will be displayed in the Remarks Column of the individual pending case.

## SORTING THE CASE LIST

You can sort each of the columns in your case list within each Holding Type. Place your cursor in a column that you wish to sort. For example, if you wish to see all of your cases that are with a certain carrier, click on the heading "Carrier Name". You will then see a small blue triangle in the title box. If the triangle is pointing up, the column will be sorted alphabetically in ascending order. If you wish to sort the column in descending alphabetical order, simply click again in the title box and it will sort in the opposite direction. You may sort any of the columns in ascending or descending order, but they will only be sorted within that Holding Type.

Click any title heading to sort column in ascending or descending order within a Holding Type

SmartView for Advisor | Powered by Ebix, Inc. - Windows Internet Explorer

https://mySMARToffice4.ez-data.com/pages/advisorview/index.html#holdings=all

File Edit View Favorites Tools Help

Search

Case List | Change Password | Sign out  
Previous Case | Next Case  
John Doe | Friday, October 28, 2011

Integrations  
Labels - SmartLink  
LTC Quote  
Carrier Rankings  
Life Quote  
Illustration

Pending Cases | Print List

**Pending Cases List**

Contact Name	Policy #	Carrier Name	Product Name	Benefit	Status	Status Date	Case Manager E-Mail
<b>Holding Type: Annuity (2 Pending Cases)</b>							
<a href="#">Applebee, Caroline</a>	T00008	American General Life Insurance Company	AG Platinum Income Annuity		Submitted	10/25/2011	<a href="mailto:marion@asafife.com">marion@asafife.com</a>
<a href="#">Smith, Jane</a>	T00007	Companion Life Insurance Company	Corporate Annuity Solutions		Issued	10/25/2011	<a href="mailto:marion@asafife.com">marion@asafife.com</a>
<b>Holding Type: DI (1 Pending Case)</b>							
<b>Holding Type: LTC (3 Pending Cases)</b>							
<a href="#">Smith, John</a>	LTC00001	Genworth Life Insurance Company Of New York	Privileged Choice		Pending	10/21/2011	<a href="mailto:marion@asafife.com">marion@asafife.com</a>
<a href="#">Smith, John</a>	LTC00002	Genworth Life Insurance Company Of New York	Privileged Choice - Shared Benefit		Pending	10/21/2011	<a href="mailto:marion@asafife.com">marion@asafife.com</a>
<a href="#">Smith, John</a>	LTC00003	Genworth Life Insurance Company Of New York	Privileged Choice - Shared Benefit		Approved	10/21/2011	<a href="mailto:marion@asafife.com">marion@asafife.com</a>
<b>Holding Type: Life (7 Pending Cases)</b>							

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Start | Microsoft Office 0... | SmartView for Ad... | 5763 - ShoreTel Call... | ANNE BRADLEY do... | Manual - SmartOffice... | Password Agent - Pa... | 1:28 PM

## OPENING A PENDING CASE

Click on the hyperlink for the individual case you want to view

SmartView for Advisor | Powered by Ebix, Inc. - Windows Internet Explorer

https://mySMARToffice4.ez-data.com/pages/advisorview/index.html#holdings=all

File Edit View Favorites Tools Help

Search

Case List | Change Password | Sign out  
Previous Case | Next Case  
John Doe | Friday, October 28, 2011

Integrations  
Labels - SmartLink  
LTC Quote  
Carrier Rankings  
Life Quote  
Illustration

Pending Cases | Print List

[Smith, John](#) LTC00001 Genworth Life Insurance Company Of New York Privileged Choice Pending 10/21/2011 [marion@asafife.com](mailto:marion@asafife.com)

[Smith, John](#) LTC00002 Genworth Life Insurance Company Of New York Privileged Choice - Shared Benefit Pending 10/21/2011 [marion@asafife.com](mailto:marion@asafife.com)

**Holding Type: Life (7 Pending Cases)**

[Applebee, Caroline](#) Principal Life Insurance Company Survivorship Universal Life (SUL) Protector (2011) 10,000,000 Submitted 10/21/2011 [marion@asafife.com](mailto:marion@asafife.com)

[Mertz, Fred](#) T00006 Metropolitan Life Insurance Company Legacy Advantage SUL 10,000,000 Await Approval 10/21/2011 [marion@asafife.com](mailto:marion@asafife.com)

[Ricardo, Ricky](#) T00010 Metropolitan Life Insurance Company Legacy Advantage SUL 5,000,000 All UW Requirements In 10/21/2011 [marion@asafife.com](mailto:marion@asafife.com)

[Smith, Jane](#) T00001 William Penn Life Insurance Of New York Penn Term 15 2,000,000 Submitted 10/21/2011 [marion@asafife.com](mailto:marion@asafife.com)

[Smith, Jane](#) T00004 ING ReliaStar Life Insurance Company Of New York ING TermSmartNY 20 (2010) 2,000,000 Pending 10/21/2011 [marion@asafife.com](mailto:marion@asafife.com)

[Smith, John](#) T00003 Prudential Insurance Company Of America PruLife Universal Plus 5,000,000 Delivered 10/21/2011 [marion@asafife.com](mailto:marion@asafife.com)

[Smith, John](#) T00002 Metropolitan Life Insurance Company Guarantee Advantage UL 5,000,000 Issued 10/21/2011 [marion@asafife.com](mailto:marion@asafife.com)

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Start | Microsoft Office ... | SmartView for A... | 5763 - ShoreTel Call... | ANNE BRADLEY do... | Manual - SmartOffice... | Password Agent - Pa... | 2:32 PM

## VIEWING A SINGLE PENDING CASE

The Case List is divided into three sections: *Case Status*, *Insured* and *Requirements* (see next page for detailed information).

The screenshot shows the SmartView for Advisor interface in a Windows Internet Explorer browser. The address bar displays the URL: <https://mysmartoffice4.ez-data.com/pages/advisorview/index.html#newbus=41603.44785>. The browser title is "SmartView for Advisor | Powered by Ebix, Inc. - Windows Internet Explorer".

The interface shows a navigation bar with links: [Case List](#), [Change Password](#), [Sign out](#), [Previous Case](#), and [Next Case](#). The user name "John Doe" and the date "Monday, October 31, 2011" are displayed.

The main content area is titled "Case Status - Smith, Jane | Printer Friendly". It is divided into three sections, each highlighted with a red box:

- Case Status:** A table with the following data:
 

Policy #	T00004	Date Entered	10/21/2011
Carrier	ING ReliaStar Life Insurance Company Of New York	Case Status	Pending
Product Name	ING TermSmart*NY 20 (2010)	Benefit	2,000,000
Proposed Modal Premium	500.00	Issued Modal Premium	
Proposed Premium Mode	5	Issued Premium Mode	0
Primary Advisor	Doe, John	Case Manager	Marion Olthoff
Contact	Smith, Jane	Case Manager E-mail	marion@asqlife.com
Owner	Smith, Jane	Case Type	Life
- Insured:** A table with the following data:
 

Contact Name	Proposed Underwriting Class	Issued Underwriting Class
Smith, Jane	Female Preferred Plus Non-Tobacco	
- Requirements:** A table with the following data:
 

Requesting Carrier	Requirements	Requirement Status	Required Of	Status Date	Completed	Remarks
Contact Name: Smith, Jane (10 Requirements)						
ING ReliaStar Life Insurance Company Of New York	Illustration			10/21/2011	10/21/2011	
ING ReliaStar Life Insurance Company Of New York	Lab Slip			10/21/2011		
ING ReliaStar Life Insurance Company Of New York	HIV Consent Form			10/21/2011	10/21/2011	
ING ReliaStar Life Insurance Company Of New York	Blood Profile & Urinalysis			10/21/2011		

The bottom of the screen shows the Windows taskbar with the Start button, system tray, and taskbar icons for "Inbox - Microsoft Outlook", "John Doe - Message (HT...", "SmartView for Adv...", "Document1 - Microsoft W...", and "Manual - SmartOffice For...". The system clock shows "3:17 PM".

You may also scroll to the previous or next case from the Case Status window:

The screenshot shows the SmartView for Advisor interface in a Windows Internet Explorer browser. The address bar displays the URL: <https://mysmartoffice4.ez-data.com/pages/advisorview/index.html#newbus=41603.44785>. The browser title is "SmartView for Advisor | Powered by Ebix, Inc. - Windows Internet Explorer".

The interface shows a navigation bar with links: [Case List](#), [Change Password](#), [Sign out](#), [Previous Case](#), and [Next Case](#). The user name "John Doe" and the date "Monday, October 31, 2011" are displayed.

The main content area is titled "Case Status - Smith, Jane | Printer Friendly". It is divided into three sections, each highlighted with a red box:

- Case Status:** A table with the following data:
 

Contact Name	Proposed Underwriting Class	Issued Underwriting Class
Smith, Jane	Female Preferred Plus Non-Tobacco	
- Insured:** A table with the following data:
 

Contact Name	Proposed Underwriting Class	Issued Underwriting Class
Smith, Jane	Female Preferred Plus Non-Tobacco	
- Requirements:** A table with the following data:
 

Requesting Carrier	Requirements	Requirement Status	Required Of	Status Date	Completed	Remarks
Contact Name: Smith, Jane (10 Requirements)						
ING ReliaStar Life Insurance Company Of New York	Illustration			10/21/2011	10/21/2011	
ING ReliaStar Life Insurance Company Of New York	Lab Slip			10/21/2011		
ING ReliaStar Life Insurance Company Of New York	HIV Consent Form			10/21/2011	10/21/2011	
ING ReliaStar Life Insurance Company Of New York	Blood Profile & Urinalysis			10/21/2011		
ING ReliaStar Life Insurance Company Of New York	Inspection Report			10/21/2011		
ING ReliaStar Life Insurance Company Of New York	APS - Dr. Johnson			10/21/2011		
ING ReliaStar Life Insurance Company Of New York	APS			10/21/2011		Mt. Kisco Medical Center
ING ReliaStar Life Insurance Company Of New York	HIPAA Authorization			10/21/2011	10/21/2011	
ING ReliaStar Life Insurance Company Of New York	Definition of Replacement			10/21/2011	10/21/2011	
ING ReliaStar Life Insurance Company Of New York	Paramedical Exam			10/21/2011		

The bottom of the screen shows the Windows taskbar with the Start button, system tray, and taskbar icons for "Inbox - Microsoft Outlook", "John Doe - Message (HT...", "SmartView for Adv...", "Document1 - Microsoft W...", and "Manual - SmartOffice For...". The system clock shows "3:29 PM".

**CASE STATUS**

<b>Policy Number:</b>	<i>Will be shown once the carrier has assigned a number</i>
<b>Date Entered:</b>	<i>This is the date the application was entered into ASG's SmartOffice system.</i>
<b>Carrier:</b>	<i>Insurance Company Name</i>
<b>Case Status:</b>	<i>Submitted, Pending, All UW Requirements In, Await Approval, Approved, Issued, Delivered</i>
<b>Product Name:</b>	<i>Plan of Insurance Applied For</i>
<b>Benefit:</b>	<i>Face Amount (Life cases), Monthly Benefit Amount for DI cases</i>
<b>Proposed Modal Premium:</b>	<i>The modal premium entered from the illustration that was provided with the application</i>
<b>Issued Modal Premium:</b>	<i>Modal premium after policy has been issued (may not be the same as the Proposed Modal Premium if approved other than applied for)</i>
<b>Proposed Premium Mode:</b>	<i>Premium payment frequency based on application</i>
<b>Issued Premium Mode:</b>	<i>Premium payment frequency at the time policy is issued</i>
<b>Primary Advisor:</b>	<i>Agent's Name</i>
<b>Case Manager:</b>	<i>The Agent Support Group Case Manager who is handling the case</i>
<b>Contact:</b>	<i>Proposed Insured's Name (Only the Primary Insured's name will be shown here on cases that have joint insureds)</i>
<b>Case Manager E-Mail:</b>	<i>Provided as a hyperlink that may be clicked on to send an email directly to the ASG Case Manager</i>
<b>Owner:</b>	<i>Policyowner's Name. If there are joint Owners, both names will be shown here.</i>
<b>Case Type:</b>	<i>Life, LTC, DI or Annuity</i>

**INSURED**

<b>Contact Name:</b>	<i>Proposed Insured's Name. If there are joint insureds, both names will be shown.</i>
<b>Proposed Underwriting Class:</b>	<i>Underwriting Class entered into SmartOffice based on illustration received with application or on medical information available</i>
<b>Issued Underwriting Class:</b>	<i>The underwriting class approved and issued by the Carrier</i>

**REQUIREMENTS**

<b>Requesting Carrier:</b>	<i>Insurance Company Name</i>
<b>Requirements:</b>	<i>Outstanding and Received underwriting or issue requirements</i>
<b>Requirement Status:</b>	<i>Indicates whether that requirement is still outstanding or has been received</i>
<b>Required Of:</b>	<i>Advisor (agent), GA, Carrier or Home Office, Doctor/Medical Facility (APs)</i>
<b>Status Date:</b>	<i>The last status date of that requirement, either the date it was first entered as "outstanding", or the date it was received</i>
<b>Completed:</b>	<i>Date the requirement was received</i>
<b>Remarks:</b>	<i>Notes entered by the case manager regarding that requirement, such as a doctor's name if the requirement is an APS, amount of initial premium due if issued, etc. In addition, the Monthly/Daily Benefit Amount for Long Term Care cases will be displayed here.</i>

All of the columns in the Requirements section may be sorted by clicking on the column title.

### EXAMPLE OF ISSUED/DELIVERED STATUS

SmartView for Advisor | Powered by Ebix, Inc. - Windows Internet Explorer

https://mysmartoffice4.ez-data.com/pages/advisorview/index.html#newbus=41603.44783

Case List | Change Password | Sign out  
Previous Case | Next Case  
John Doe | Monday, October 31, 2011

Case Status - Smith, John | Printer Friendly

<b>Case Status</b>	
Policy #	T00003
Carrier	Prudential Insurance Company Of America
Product Name	PruLife Universal Plus
Proposed Modal Premium	2,000.00
Proposed Premium Mode	Semi-Annually
Primary Advisor	Doe, John
Contact	Smith, John
Owner	Smith, John
Date Entered	10/21/2011
Case Status	Delivered
Benefit	5,000,000
Issued Modal Premium	4,500.00
Issued Premium Mode	Annually
Case Manager	Marion Uttroni
Case Manager E-mail	marion@asqlife.com
Case Type	Life

<b>Insured</b>	
Contact Name	Smith, John
Proposed Underwriting Class	Preferred Non-Smoker
Issued Underwriting Class	Preferred Non-Smoker

<b>Requirements</b>						
Requesting Carrier	Requirements	Requirement Status	Required Of	Status Date	Completed	Remarks
Contact Name: Smith, John (11 Requirements)						
Prudential Insurance Company Of America	Initial Modal Premium Payment	Outstanding	Advisor	10/21/2011		\$4,500.00
Prudential Insurance Company Of America	Illustration	Received	GA	10/21/2011	10/21/2011	
Prudential Insurance Company Of America	Policy Delivery Receipt	Outstanding	Advisor	10/21/2011		
Prudential Insurance Company Of America	MVR	Received	GA	10/21/2011	10/21/2011	

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Start | Inbox - Microsoft Outlook | John Doe - Message (HT... | SmartView for Adviso... | Document1 - Microsoft W... | Manual - SmartOffice For ... | 3:35 PM

## PRINTING CASE STATUS

You can choose to print your entire case list or an individual case status.

To print your Case List, click on **Print List** from the Case List window:

SmartView for Advisor | Powered by Ebix, Inc. - Windows Internet Explorer

https://mysmartoffice4.ez-data.com/pages/advisorview/index.html?holdings=all

File Edit View Favorites Tools Help

Google Search

SmartView for Advisor | Po... X

Case List | Change Password | Sign out  
Previous Case | Next Case  
John Doe | Wednesday, November 02, 2011

**Integrations**

- Labels - SmartLink
- LTC Quote
- Carrier Rankings
- Life Quote
- Illustration

**Pending Case List | Print List**

**Pending Case List**

Contact Name	Policy #	Carrier Name	Product Name	Benefit	Status	Status Date	Case Manager E-Mail
<b>Holding Type: Annuity (2 Pending Cases)</b>							
Applebee, Caroline	T00008	American General Life Insurance Company	AG Platinum Income Annuity		Submitted	10/25/2011	marion@asqlife.com
Smith, Jane	T00007	Companion Life Insurance Company	Corporate Annuity Solutions		Issued	10/25/2011	marion@asqlife.com
<b>Holding Type: DI (1 Pending Case)</b>							
Applebee, Fred	T00009	Principal Life Insurance Company	Disability Income Insurance (HH750)	9,000	Pending	10/25/2011	marion@asqlife.com
<b>Holding Type: LTC (3 Pending Cases)</b>							
Smith, John	LTC00003	Genworth Life Insurance Company Of New York	Privileged Choice - Shared Benefit		Approved	10/21/2011	marion@asqlife.com
Smith, John	LTC00001	Genworth Life Insurance Company Of New York	Privileged Choice		Pending	10/21/2011	marion@asqlife.com
Smith, John	LTC00002	Genworth Life Insurance Company Of New York	Privileged Choice - Shared Benefit		Pending	10/21/2011	marion@asqlife.com
<b>Holding Type: Life (7 Pending Cases)</b>							
Applebee, Caroline		Principal Life Insurance Company	Survivorship Universal Life (SUL)	10,000,000	Submitted	10/21/2011	marion@asqlife.com

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To print an individual case status, click on **Printer Friendly** from the individual case window:

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Previous Case | Next Case  
John Doe | Wednesday, November 02, 2011

**Case Status - Applebee, Fred | Printer Friendly**

**Case Status**

Policy #	T00009	Date Entered	10/25/2011
Carrier	Principal Life Insurance Company	Case Status	Pending
Product Name	Disability Income Insurance (HH750)	Benefit	9,000
Proposed Modal Premium	504.00	Issued Modal Premium	
Proposed Premium Mode	Quarterly	Issued Premium Mode	
Primary Advisor	Doe, John	Case Manager	Marion Olthoff
Contact	Applebee, Fred	Case Manager E-mail	marion@asqlife.com
Owner	Applebee, Fred	Case Type	DI

**Insured**

Contact Name	Proposed Underwriting Class	Issued Underwriting Class
Applebee, Fred		

**Requirements**

Requesting Carrier	Requirements	Requirement Status	Required Of	Status Date	Completed	Remarks
<b>Contact Name: Applebee, Fred (3 Requirements)</b>						
Principal Life Insurance Company	Paramedical Exam	Received	GA	10/25/2011	10/25/2011	
Principal Life Insurance Company	Tele-App Interview	Outstanding	Insured	10/25/2011		
Principal Life Insurance Company	Blood Profile & Urine Specimen-	Received	GA	10/25/2011	10/25/2011	

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