



Below is a view of the Workbook Main Window for Blog #146 from the InsMark Illustration System along with a more complete description of each illustration further below.

InsMark Advanced (v 17.1)

Client Workbook Edit Tools Options Help

Bob's Blog

Workbook Main Window

Proposals for the workbook: Blog #146

Proposal Description	Sales Concept	Policy Data (if applicable)			
		Policy Notation	Initial Premium	Death Benefit	Name of Product
1. IUL vs Def Annuity	Permanent vs. Term	Surrender Annuity @ 65 ...	\$20,000	\$601,839	Indexed UL
2. IUL vs Def Annuity Income	Permanent vs. Term	Use Annuity for Income ...	\$20,000	\$601,839	Indexed UL
3. Calc Annuity Surrender @65	Tax Deferred Calculator	n/a	n/a	n/a	n/a
4. Calc Annuity for Income	Tax Deferred Calculator	n/a	n/a	n/a	n/a

Proposal

New...
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Proposal Description 1: IUL vs. Deferred Annuity - Annuity Surrendered at Age 65
(Permanent vs. Term module - available on the Personal Insurance tab)

Proposal Description 2: IUL vs. Deferred Annuity - Annuity Retained for Income
(Permanent vs. Term module - available on the Personal Insurance tab)

Proposal Description 3: Surrender Value of Annuity at Age 65
(Tax Deferred Account Calculator - available on the InsCalc tab)

Proposal Description 4: Annuity Retained for Income
(Tax Deferred Account Calculator - available on the InsCalc tab)

Note: Some InsMark-linked companies may have blocked some/all of the calculators on the InsCalc tab in the InsMark Illustration System. If so, contact Julie Nayeri at InsMark (julien@insmark.com) or 888-InsMark (467-6275) to purchase an upgrade that includes the InsCalc calculators.