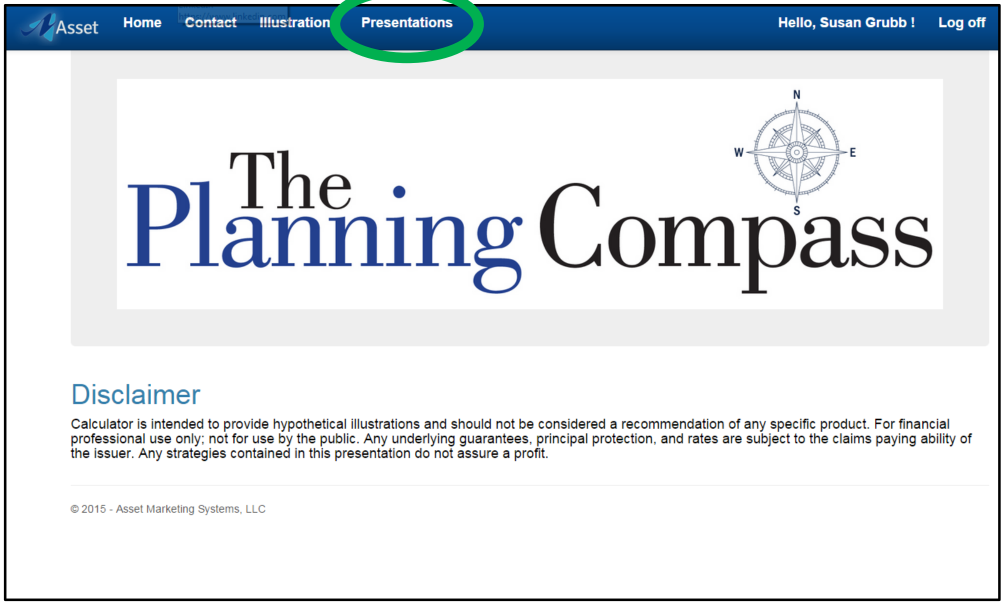
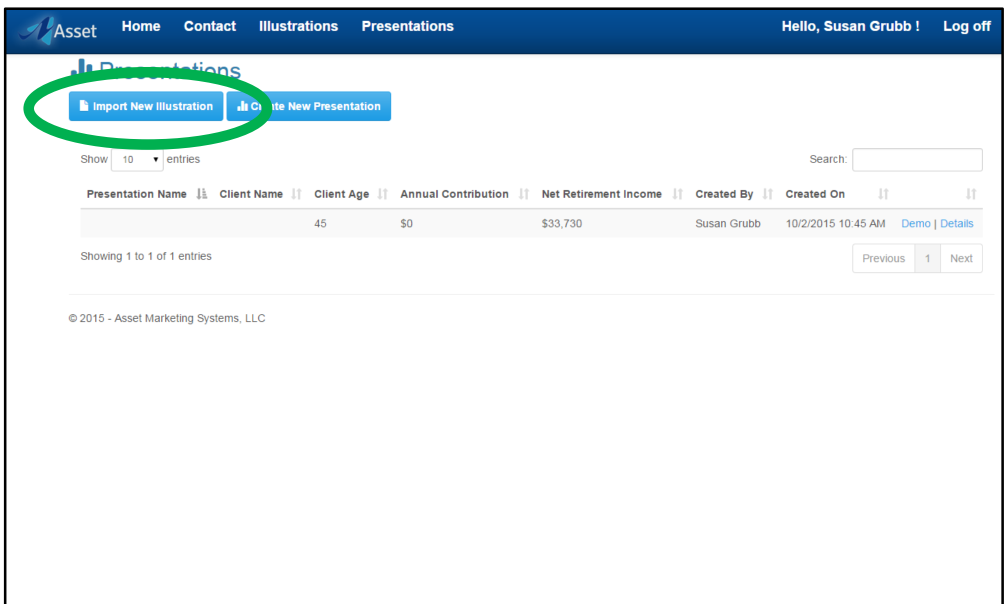
Planning Compass Calculator Instructions

1. Obtain a client illustration – the .XLS version - from the Asset for Life Team
2. Save the illustration somewhere you can easily access (i.e. your system desktop)
3. Login to the Asset Portal and launch the Calculator

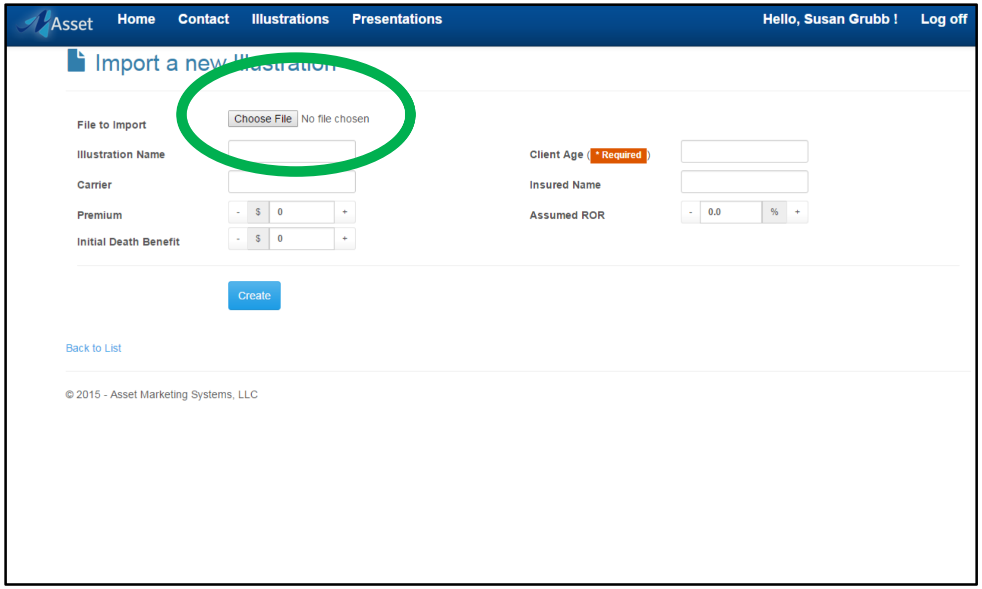


Click “Presentations”

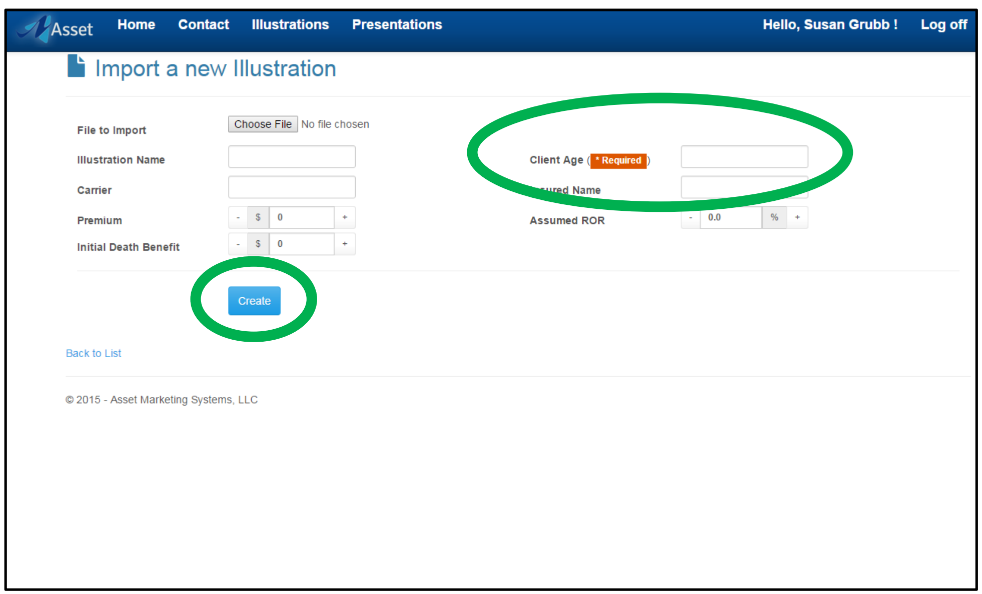


Click “Import New Illustration”

Asset

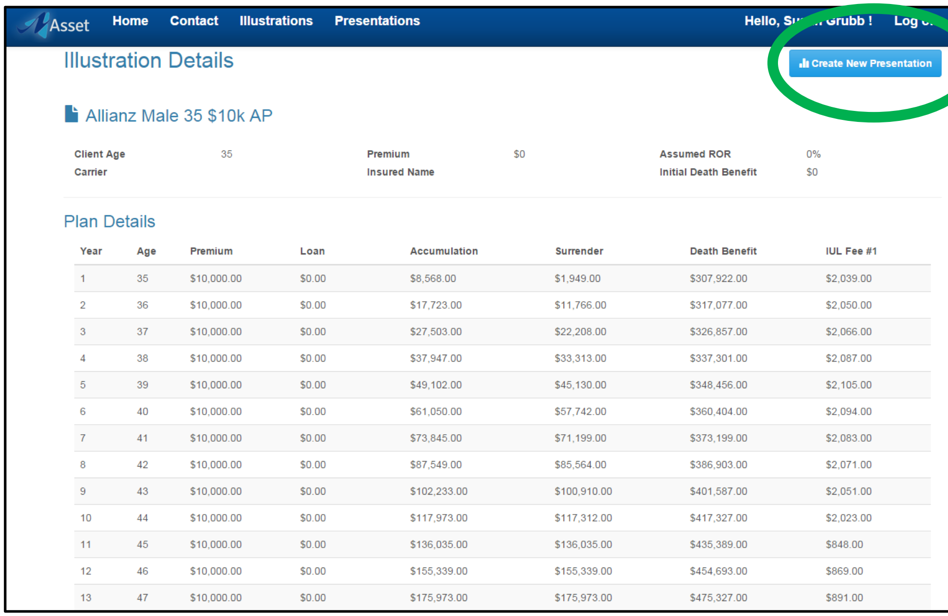


Click “Choose File” and select the illustration you want to use from the location you saved it to (i.e. desktop)



Enter in the information for the fields shown. The “Client Age” is the only required field.

Then click “Create”



Asset Home Contact Illustrations Presentations

Create New Presentation

Illustration Details

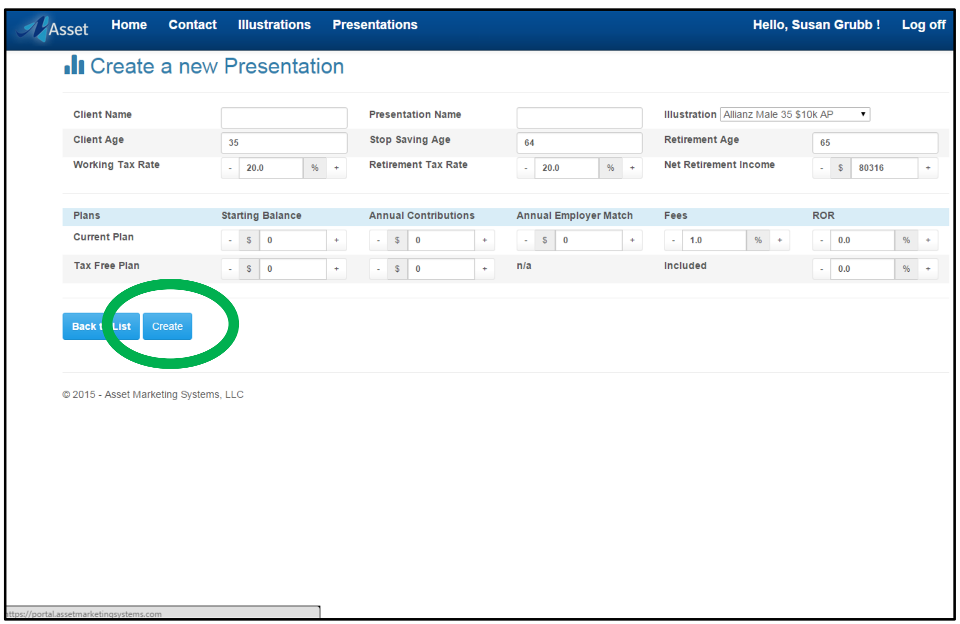
Allianz Male 35 $10k AP

Client Age	35	Premium	$0	Assumed ROR	0%
Carrier		Insured Name		Initial Death Benefit	$0

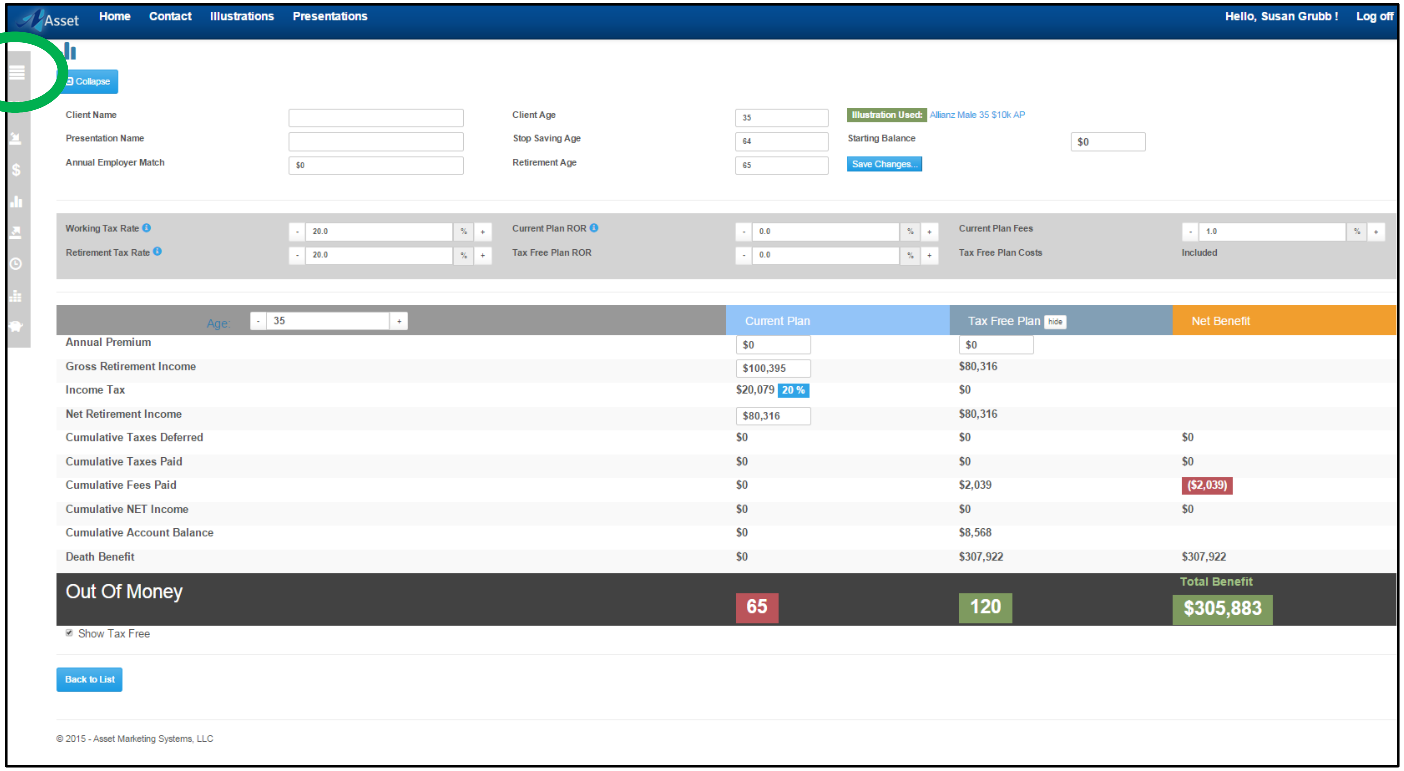
Plan Details

Year	Age	Premium	Loan	Accumulation	Surrender	Death Benefit	IUL Fee #1
1	35	$10,000.00	$0.00	$8,568.00	$1,949.00	$307,922.00	$2,039.00
2	36	$10,000.00	$0.00	$17,723.00	$11,766.00	$317,077.00	$2,050.00
3	37	$10,000.00	$0.00	$27,503.00	$22,208.00	$326,857.00	$2,066.00
4	38	$10,000.00	$0.00	$37,947.00	$33,313.00	$337,301.00	$2,087.00
5	39	$10,000.00	$0.00	$49,102.00	$45,130.00	$348,456.00	$2,105.00
6	40	$10,000.00	$0.00	$61,050.00	$57,742.00	$360,404.00	$2,094.00
7	41	$10,000.00	$0.00	$73,845.00	$71,199.00	$373,199.00	$2,083.00
8	42	$10,000.00	$0.00	$87,549.00	$85,564.00	$386,903.00	$2,071.00
9	43	$10,000.00	$0.00	$102,233.00	$100,910.00	$401,587.00	$2,051.00
10	44	$10,000.00	$0.00	$117,973.00	$117,312.00	$417,327.00	$2,023.00
11	45	$10,000.00	$0.00	$136,035.00	$136,035.00	$435,389.00	$848.00
12	46	$10,000.00	$0.00	$155,339.00	$155,339.00	$454,693.00	$869.00
13	47	$10,000.00	$0.00	$175,973.00	$175,973.00	$475,327.00	$891.00

After you see the illustration details populate, click "Create New Presentation"



Enter in the information for the fields shown. Then click "Create"



The menu items to the left can help you illustrate specific topics during your calculator presentation. Selecting the first icon  shows/expands the name for each icon. When you select that icon again, it collapses the expanded menu.