

LIFE ILLUSTRATIONS

Inforce Illustration

How-to Guide

With our self-service inforce illustration system, you have the ability to run illustrations for inforce policies for:

- Allianz Life Pro+® Fixed Index Universal Life Insurance Policy
- Allianz Life Pro+ Elite® Fixed Index Universal Life Insurance Policy
- Allianz Life Pro+® Advantage Fixed Index Universal Life Insurance Policy

Most policies can be illustrated, assuming they are one year old and haven't had a material change (e.g., face increase, DBO change).

TO ACCESS THE ONLINE TOOL FOR ALL POLICIES:

- Log in to the Allianz agent website, www.allianzlife.com
- Navigate to **Accounts** and click **Fixed Annuity/Life**
- In the left navigation, choose **Express Policy Search** and enter your client's policy number, then click **Go**.
- Click on the blue **Inforce Illustration** button. If you received a **Request Illustration** button, this means it is not eligible for self-service. Please follow the steps below for requesting an illustration.



FOR ALLIANZ LIFE PRO+® ADVANTAGE AND ALLIANZ LIFE PRO+ ELITE® POLICIES, PLEASE TAKE THESE ADDITIONAL STEPS:

- Under Illustration Method, select **Illustration inforce reprojection**
- Enter the client's policy number and click **Get policy information**
- Click **Illustrate**

Running an inforce illustration will look similar to running a new-business illustration. If the field is "grayed out," you are not able to change that option.

If you get the **Request Illustration** button, self-service is unavailable for a policy and you have to request an inforce illustration.

Submit the request yourself using the **Request Illustration** button on the policy page OR call the Contact Center at 800.950.1962.



This is the information you'll need:

1. The policy number
2. The exact changes being requested, including (as applicable):
 - Year of change
 - Amount: death benefit amount, premium, etc.
 - Duration: premium, income, etc.
 - Disbursement information
 - Allocation changes

Quick tips:

1. Any changes you wish to illustrate for the current year will begin at the next monthiversary.
2. Any changes you make in future years will assume they begin on the first day of the policy year.
3. The illustration does not default to the original design. Be sure to address the following:
 - B to A switch needs to be input if desired
 - B to A switches in the current or future year are available to illustrate
 - Face amount **increases and decreases are available** to illustrate

FOR QUESTIONS on how to access or use the online tool, call the Contact Center at  800.950.1962

Guarantees are backed solely by the financial strength and claims-paying ability of Allianz Life Insurance Company of North America.

Products are issued by Allianz Life Insurance Company of North America, 5701 Golden Hills Drive, Minneapolis, MN 55416-1297.

This content does not apply in the state of New York.

Product and feature availability may vary by state and broker/dealer.

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