

SPREADSHEET AUTOMATION

DELIVER STUNNING SPREADSHEET COMPARISONS TO YOUR CLIENTS

As a financial advisor, you often need a plan comparison of multiple carrier illustrations to support the outreach to your valued prospect. The challenge, however, is how to accomplish this in an efficient, flexible and more compliant manner. With MRW Financial's Spreadsheet Automation, we can streamline the delivery of visually stunning "spreadsheet" comparisons in minutes.

KEY FEATURES

Stunning Spreadsheets In 3 Simple Steps

Develop stunning policy comparison spreadsheets in 3 simple steps: select your plans, define your comparison fields (values), and whether you want to compare by Age or Policy Year.

Broad Range of Comparison Values

Select up to 4 comparison fields from over 20 different values, such as Guaranteed / Non-Guaranteed: Net Death Benefit, Net Surrender Value, Cumulative Premium, IRRs and more.

Spreadsheet By Age or Policy Years

Flexible design so you can choose to present values by "Age" or "Policy Year" – and at intervals or 'all years'.

Brandable & Customizable

Incorporate your brand logo and custom disclosures on every spreadsheet proposal.

Bob Loblaw 40yr old Male

	Carrier A Plan 1 Preferred Elite Non-Tobacco			Carrier B Plan 2 Preferred Non-Tobacco		
	\$1,000,000 Initial Guaranteed Death Benefit	\$14,400 Annual Guaranteed Premium	PDF Link	\$1,000,000 Initial Guaranteed Death Benefit	\$18,510 Annual Guaranteed Premium	PDF Link
Age	Non-Guaranteed Cumulative Premium	Non-Guaranteed Net Surrender Value	Non-Guaranteed Net Surrender Value IRR	Non-Guaranteed Cumulative Premium	Non-Guaranteed Net Surrender Value	Non-Guaranteed Net Surrender Value IRR
45	14,400	-	-100.0%	18,510	-	-100.0%
50	86,400	58,662	-11.0%	111,060	63,857	-15.6%
55	158,400	158,766	0.0%	203,610	196,014	-0.6%
60	230,400	304,305	3.2%	296,160	373,322	2.7%
65	302,400	492,899	4.2%	388,710	608,039	3.9%
70	374,400	749,509	4.8%	481,260	934,242	4.6%
75	446,400	1,106,474	5.2%	573,810	1,386,316	5.0%
80	518,400	1,591,809	5.4%	666,360	2,007,951	5.3%
85	590,400	2,238,170	5.6%	758,910	2,854,131	5.5%
90	662,400	3,086,758	5.6%	851,460	3,987,058	5.7%
95	734,400	4,240,078	5.7%	944,010	5,556,387	5.8%
100	806,400	5,789,883	5.8%	1,036,560	7,768,372	5.9%
105	878,400	7,828,067	5.8%	1,057,354	10,743,727	5.9%
110	950,400	10,484,072	5.8%	1,057,354	14,823,081	6.0%

Supports All Permanent Life Products

Supports the broad majority of permanent life insurance carriers and products (GUL, Whole, UL, IUL & VUL). *VUL can only be compared with other VUL products.

Integrated Digital Audit Trail

Retains a full digital audit trail in the Cloud for your Books and Records, as well as potential future regulatory requirements.