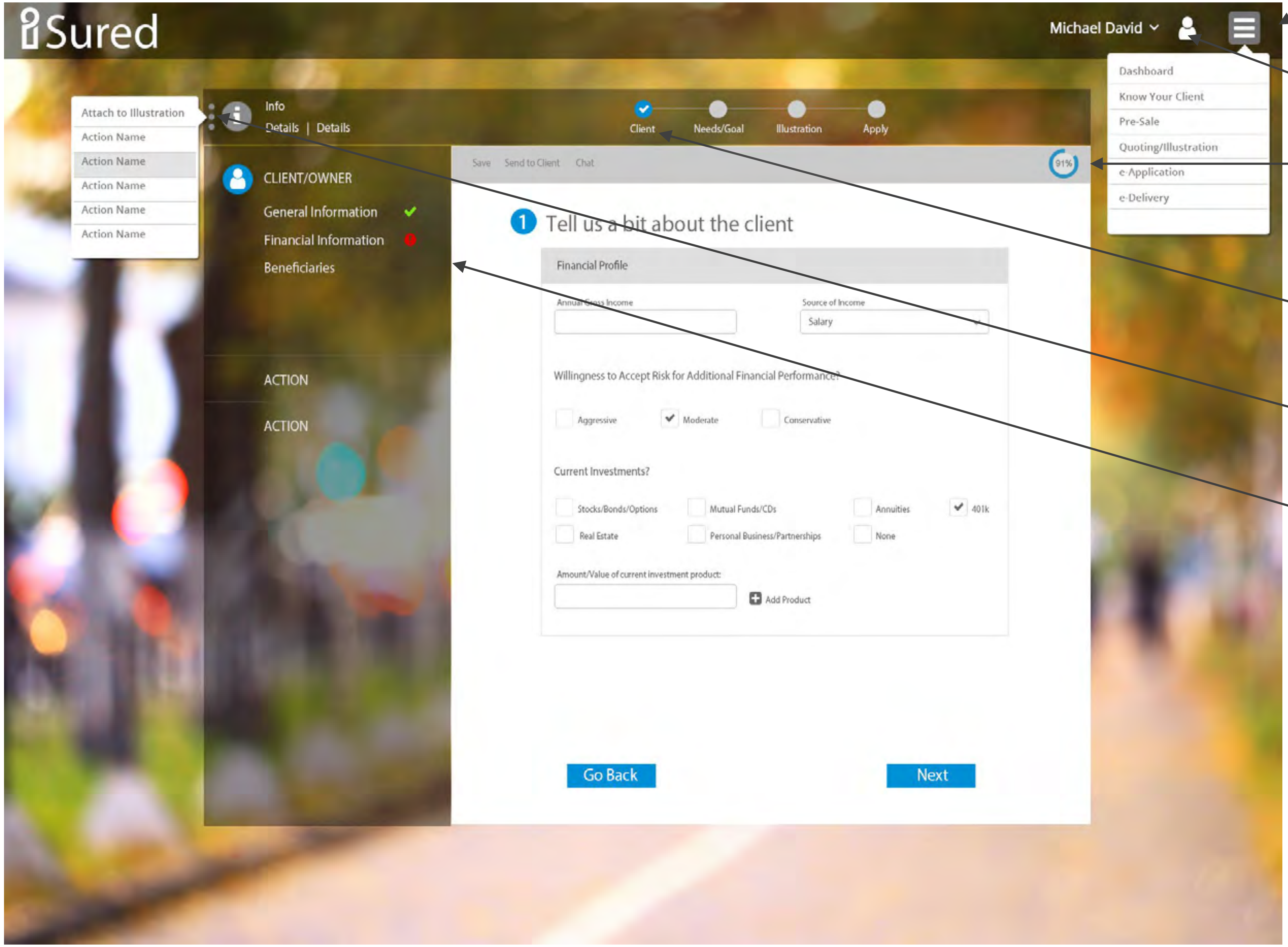
FL Framework – Navigation (Client)



Main menu – Dashboard, New App, Quote/Illustration, Help, Sign Out

User menu – Preferences, etc.

Top portion for form functions – Save, Chat, Send to Client, Form Entry %

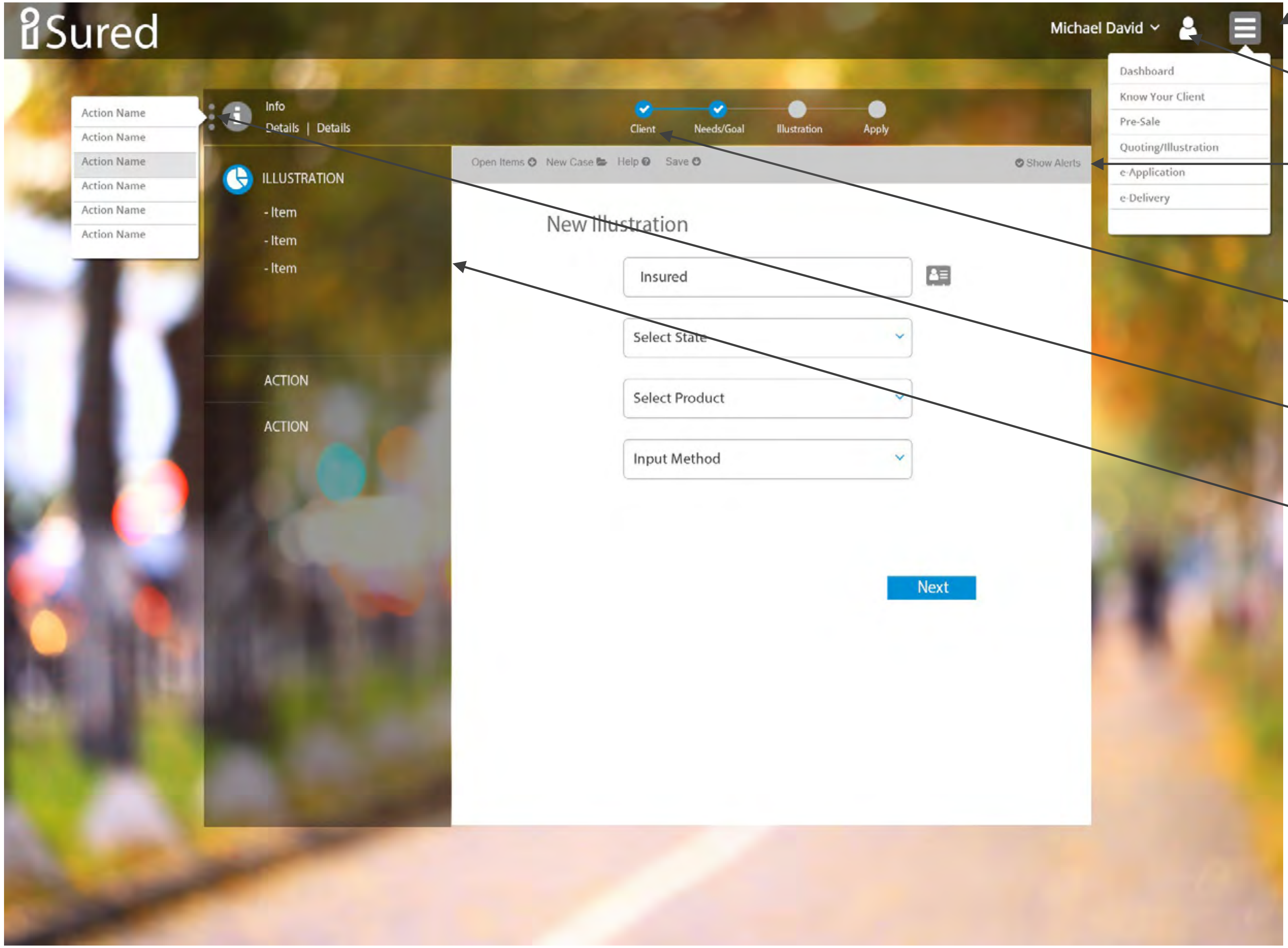
Subway to indicate Stage/Module

'Case' Actions menu

Component (Module) navigation and status (if applicable)

With Actions/Items if Needed for Component

FL Framework –Illustrations



Main menu – Dashboard, New App, Quote/Illustration, Help, Sign Out

User menu – Preferences, etc.

Top portion for form functions – Save, Chat, Send to Client, Form Entry %

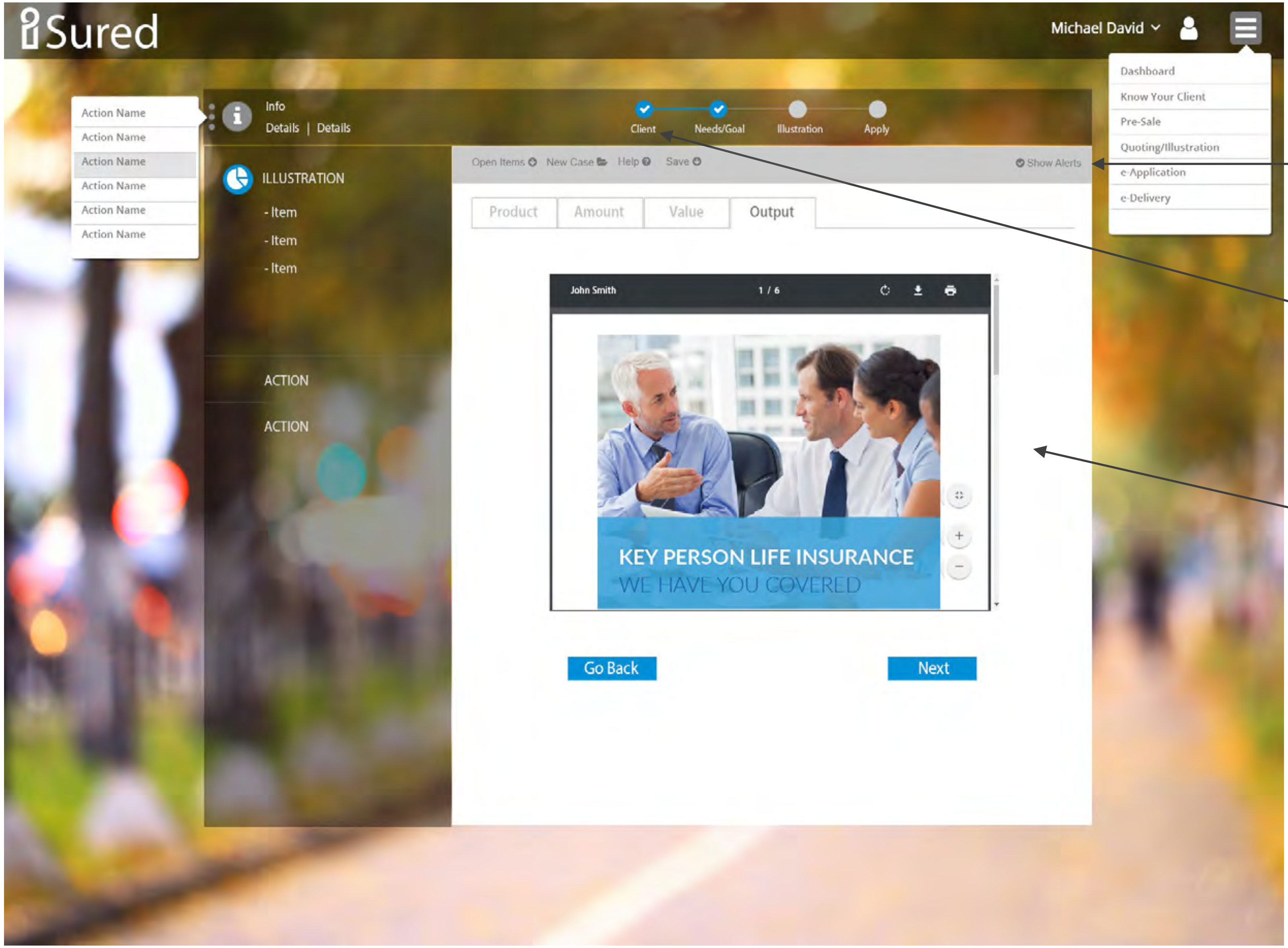
Subway to indicate Stage/Module

'Case' Actions menu

Component (Module) navigation and status (if applicable)

With Actions/Items if Needed for Component

FL Framework –Illustrations

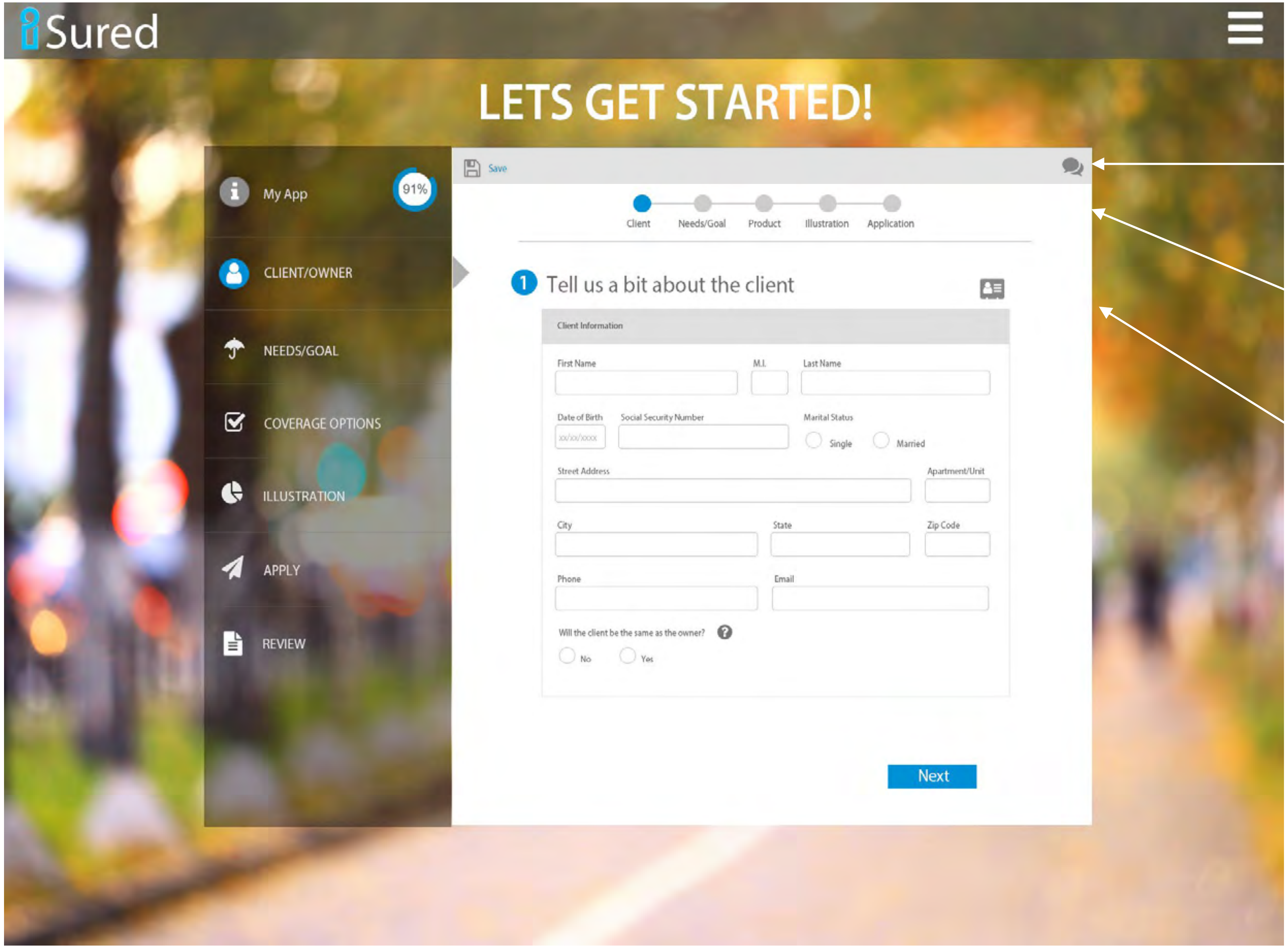


Top portion for form functions – Save, Chat, Send to Client, Form Entry %

Subway to indicate Stage/Module

Component (Module) Workspace Changes per Input/Output Display

FL Wizard – Navigation



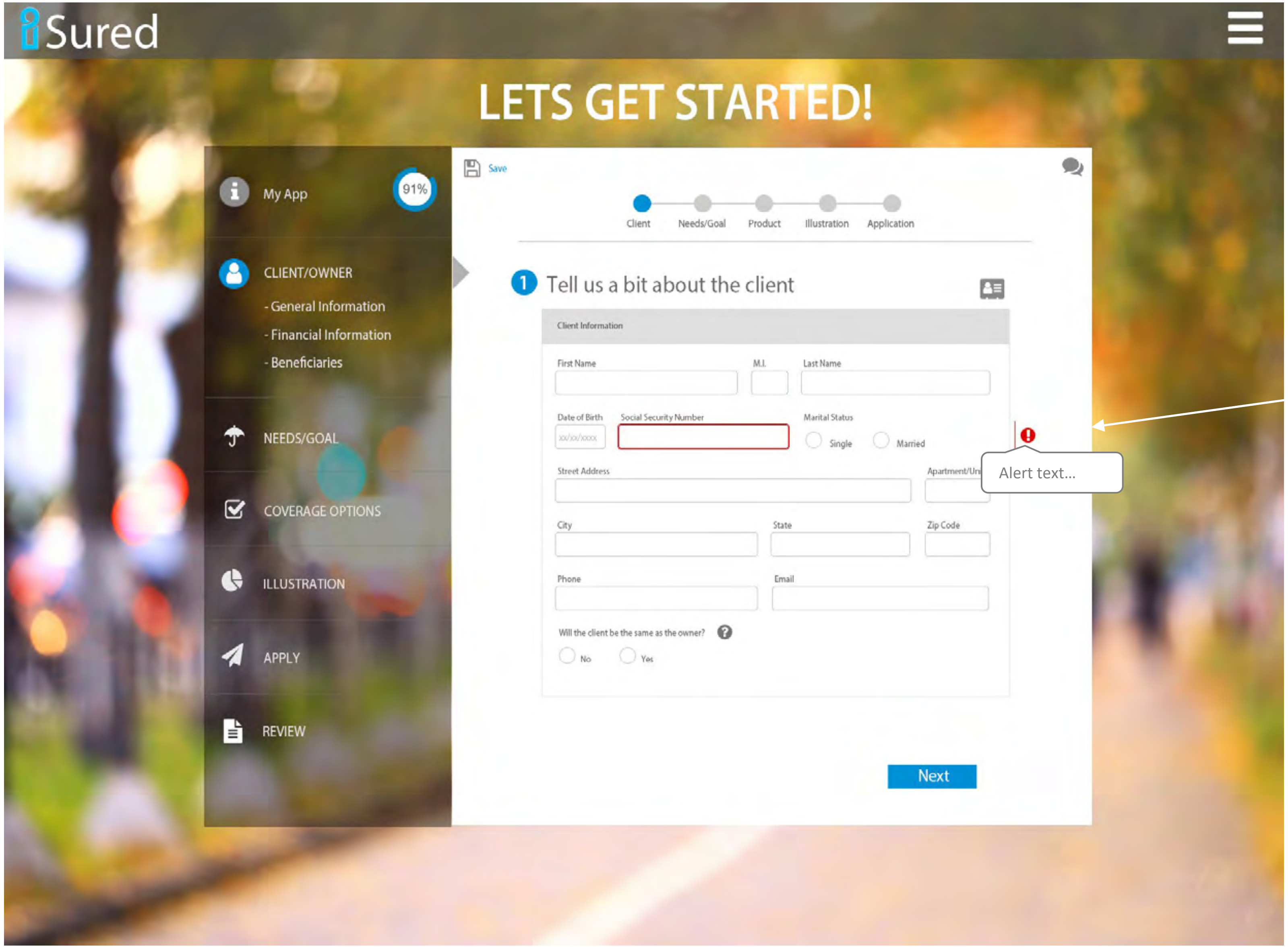
Main menu – Dashboard, New App, Quote/Illustration, Preferences, Help, Other

Top portion for form functions – Save, Chat, Send to Client, etc.

Subway to indicate stage

Click/Tap Client Contact icon to add existing client from CRM

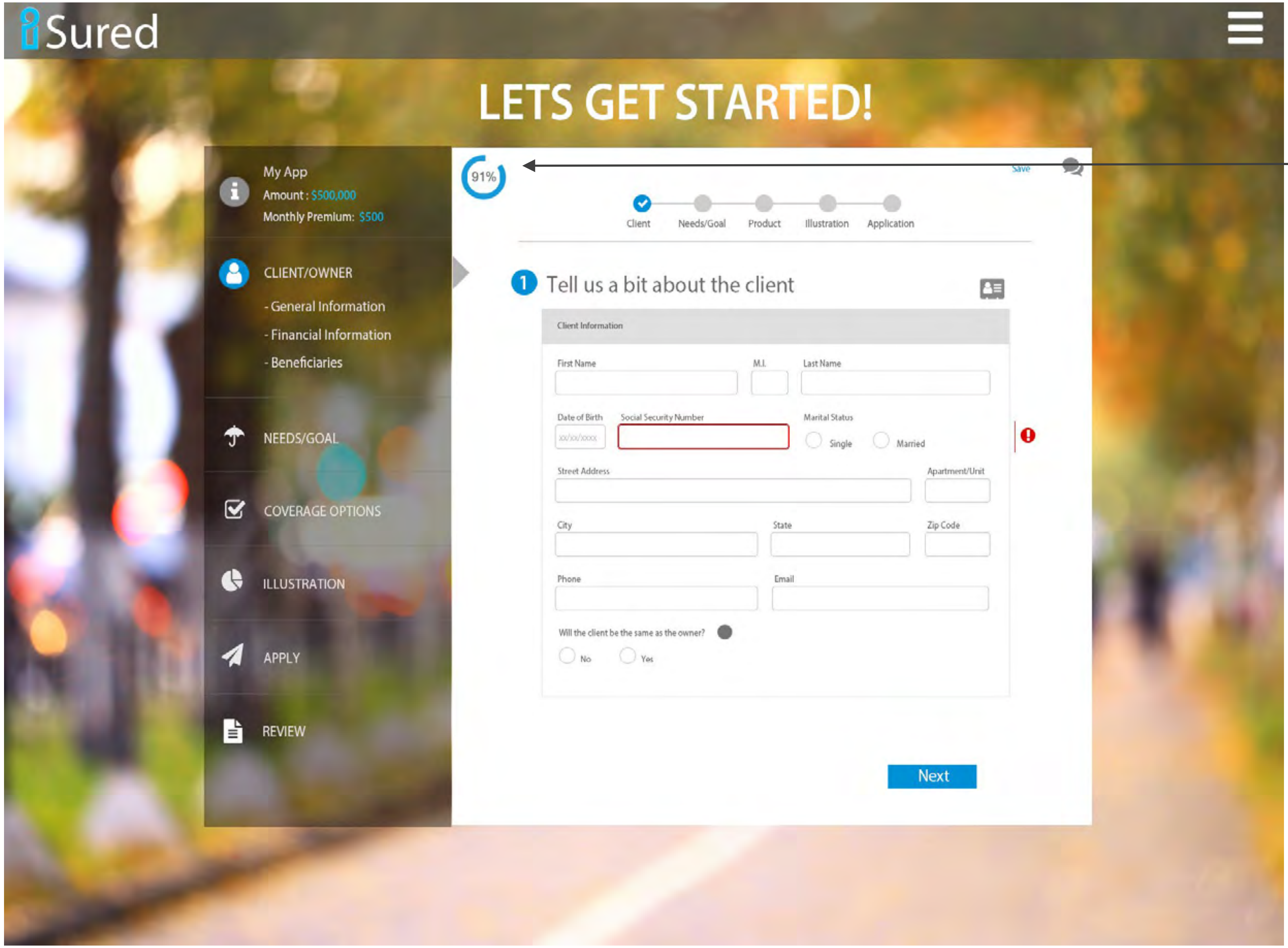
FL Wizard – Navigation



Alerts shown in progress – Can't go to Next until resolved. Click/tap on alert symbol displays alert text.

Menu on left expands on SECTION click/tap to display areas below

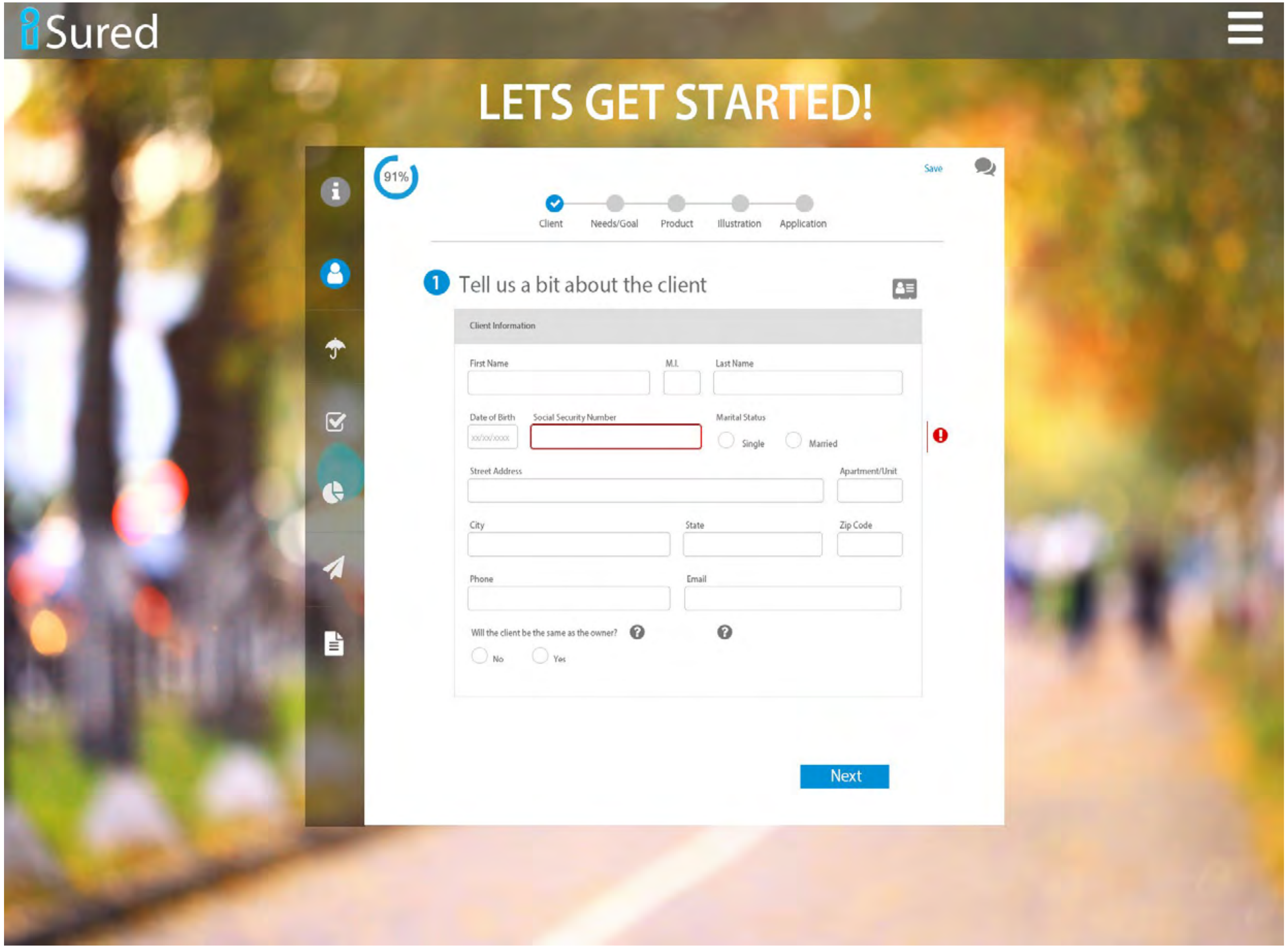
FL Wizard – Navigation



Possible alternate placement of App status.

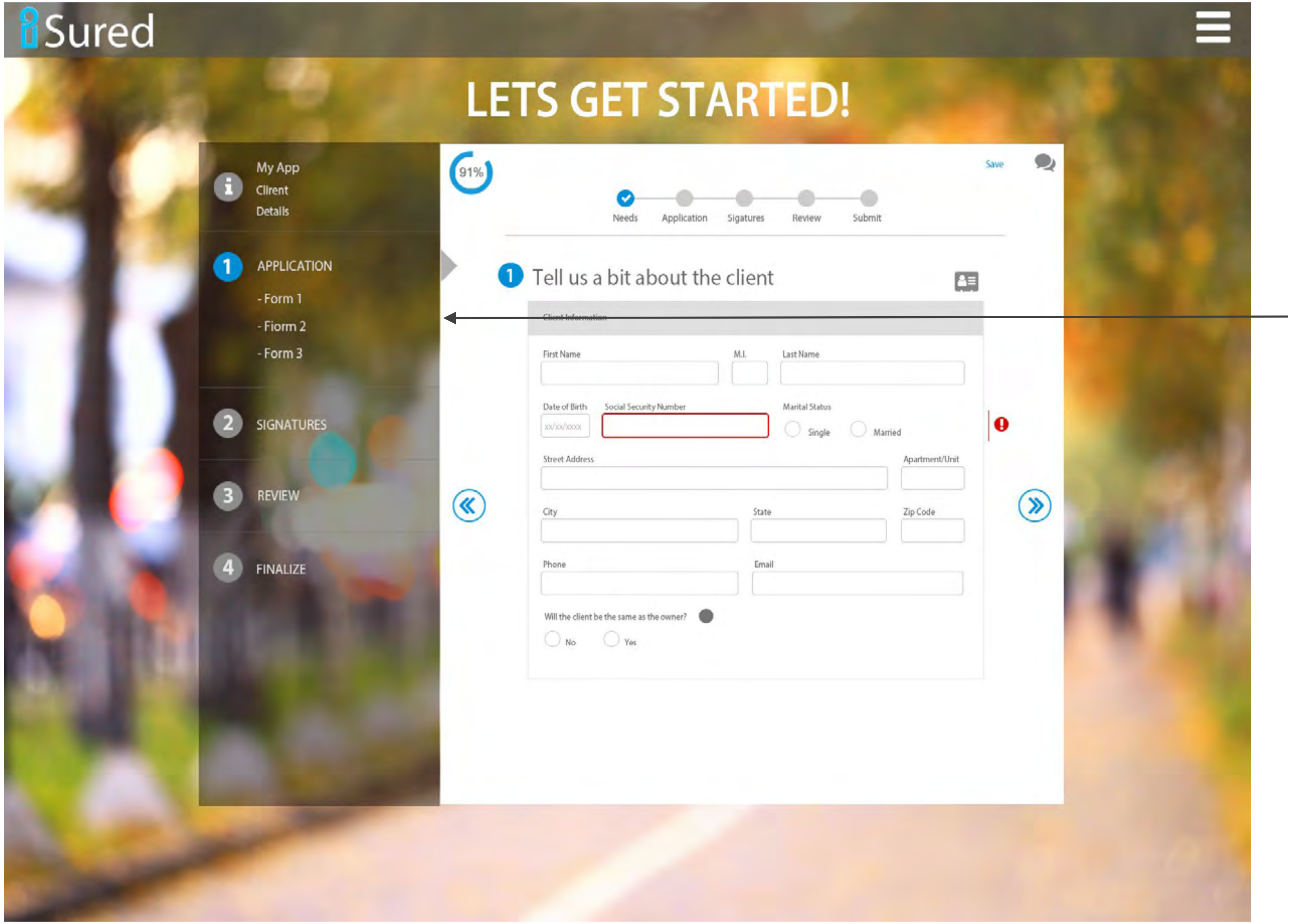
App info above left nav updates as info changes.

FL Wizard – Navigation



Collapsed left nav menu – click on any symbol to expand.

FL Forms – Navigation

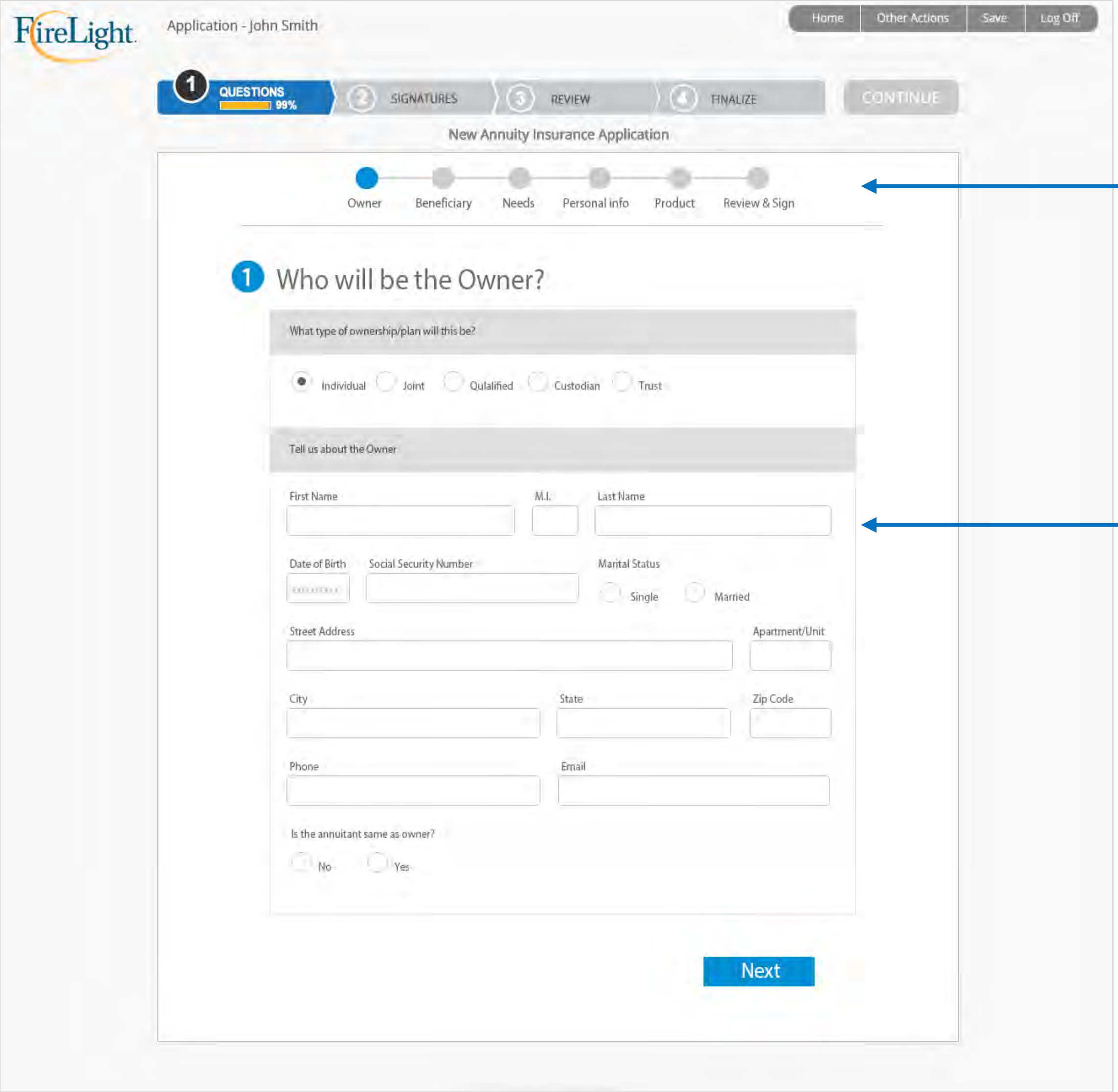


Consistent style navigation for Forms based view

Forms listed – may need to be scrollable area (max # forms in view at one time).

Arrows could still be used to go back and forth between forms if buttons not in functionality.

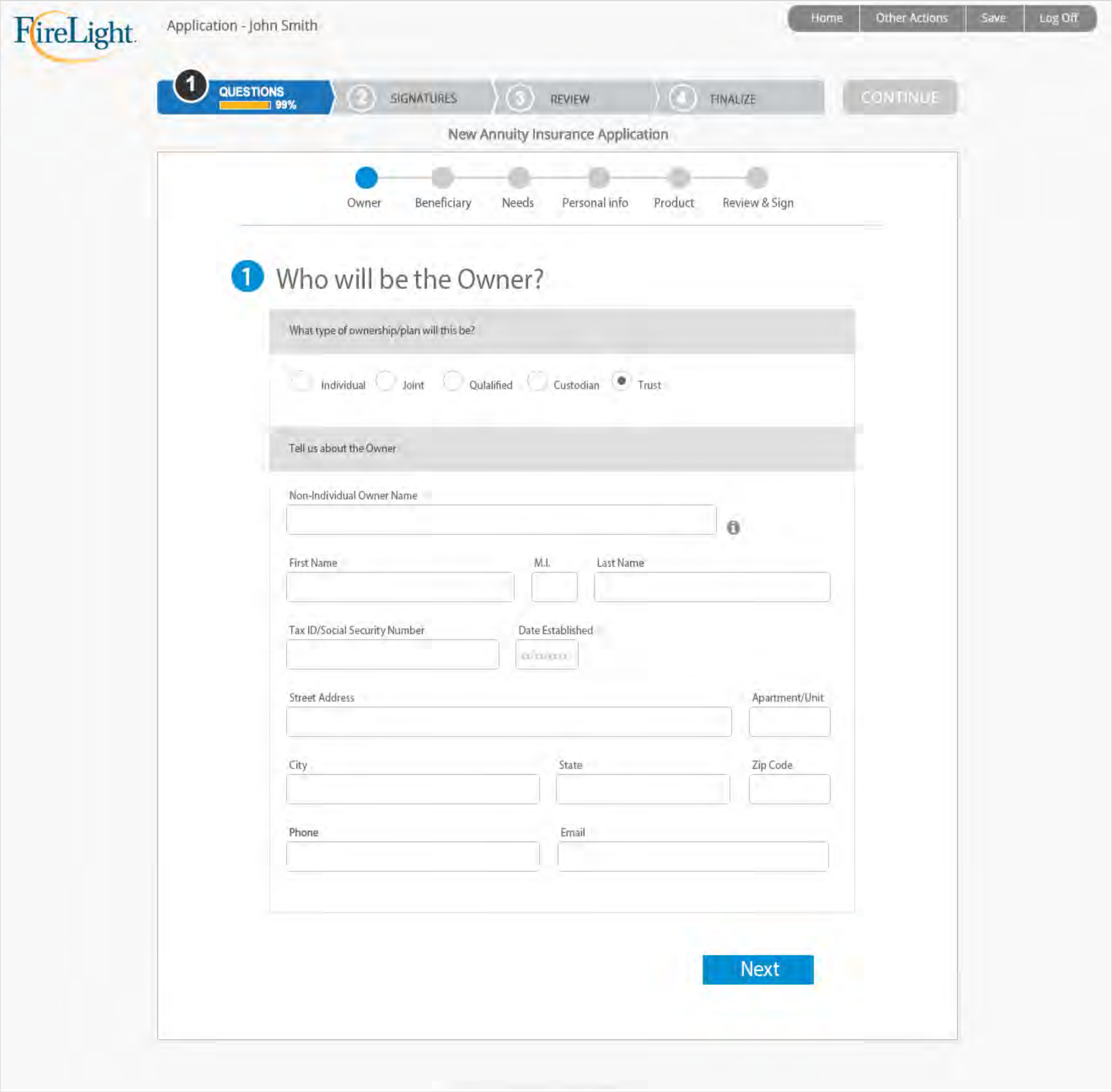
FL Wizard – Reflexive Questions



Questionnaire subway indicates progress

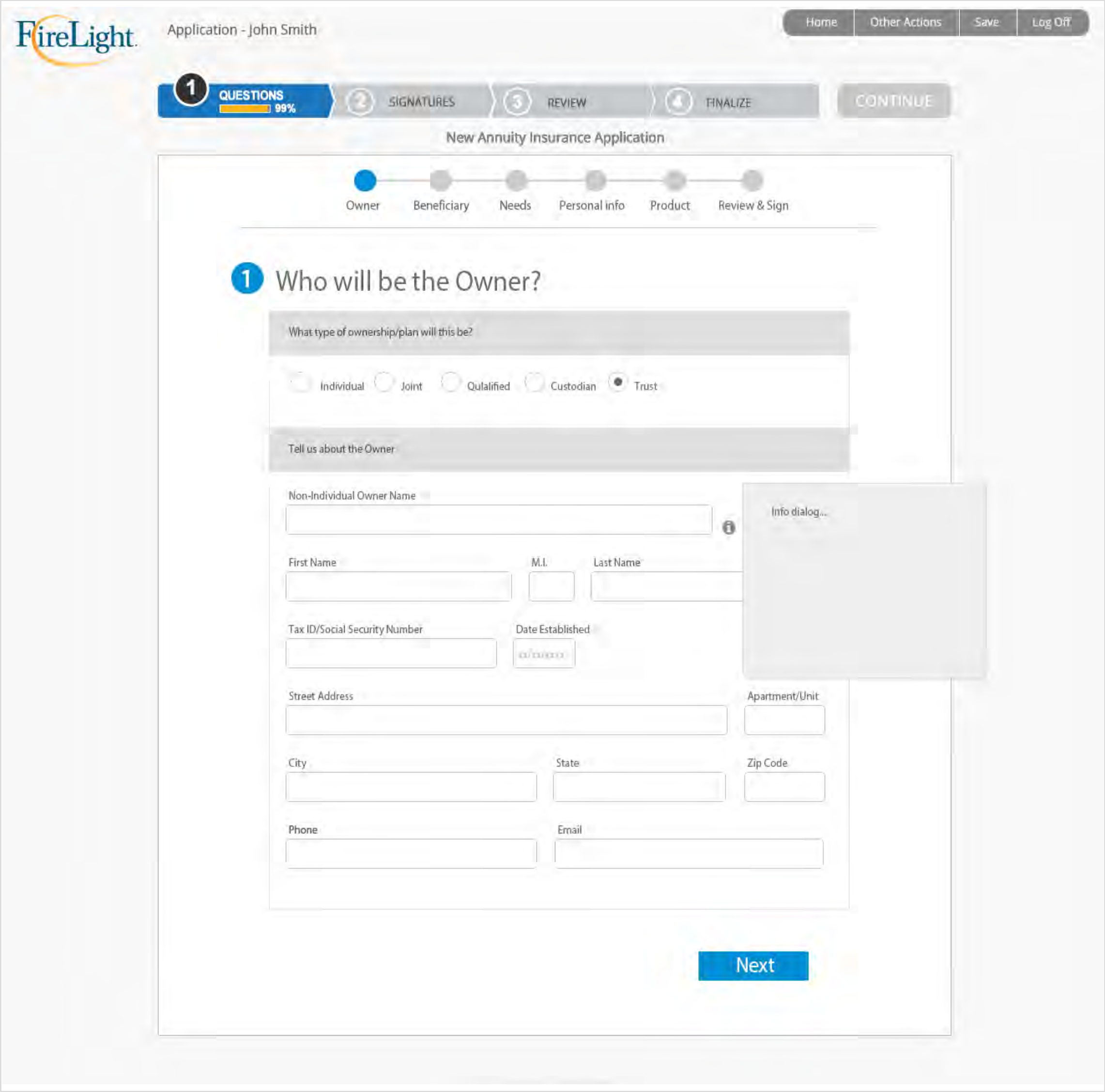
Based upon the selection of ownership/plan type above, the owner information fields will change.

FL Wizard – Reflexive Questions



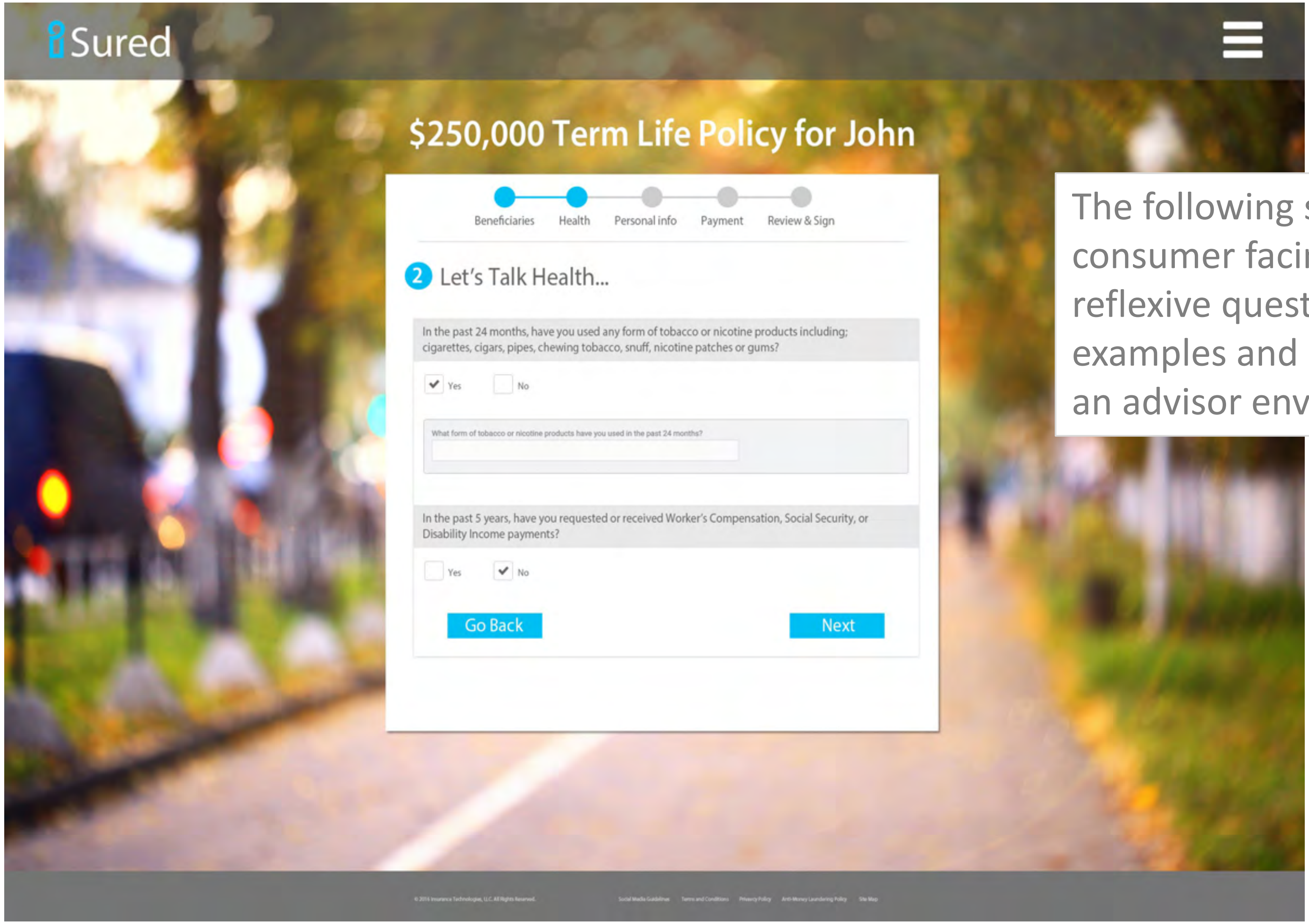
Based upon the selection of Type, The owner information fields will change.

FL Wizard – Reflexive Questions



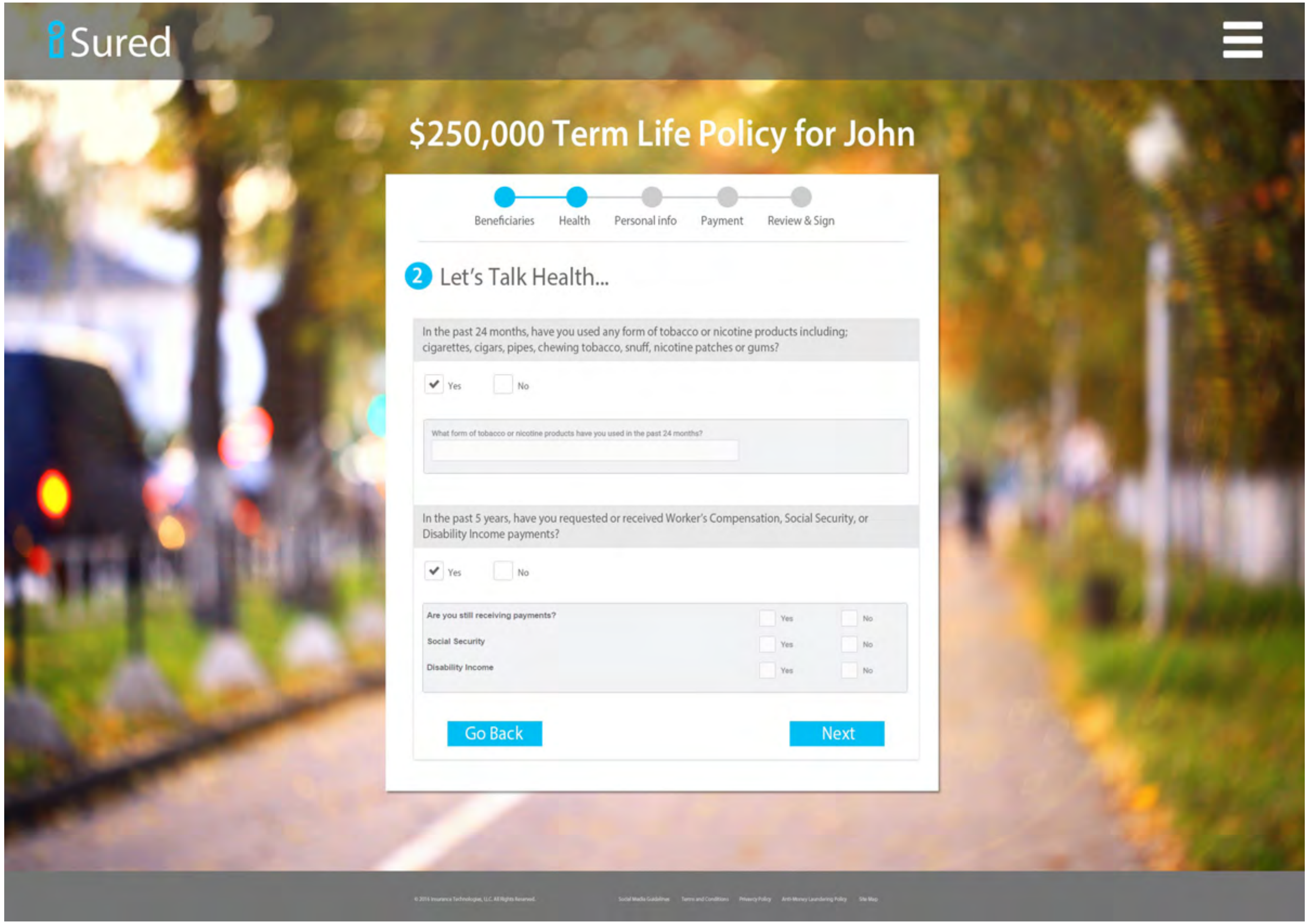
Information on fields will be available through Info dialogs (hover/touch)

Reflexive examples for Life product

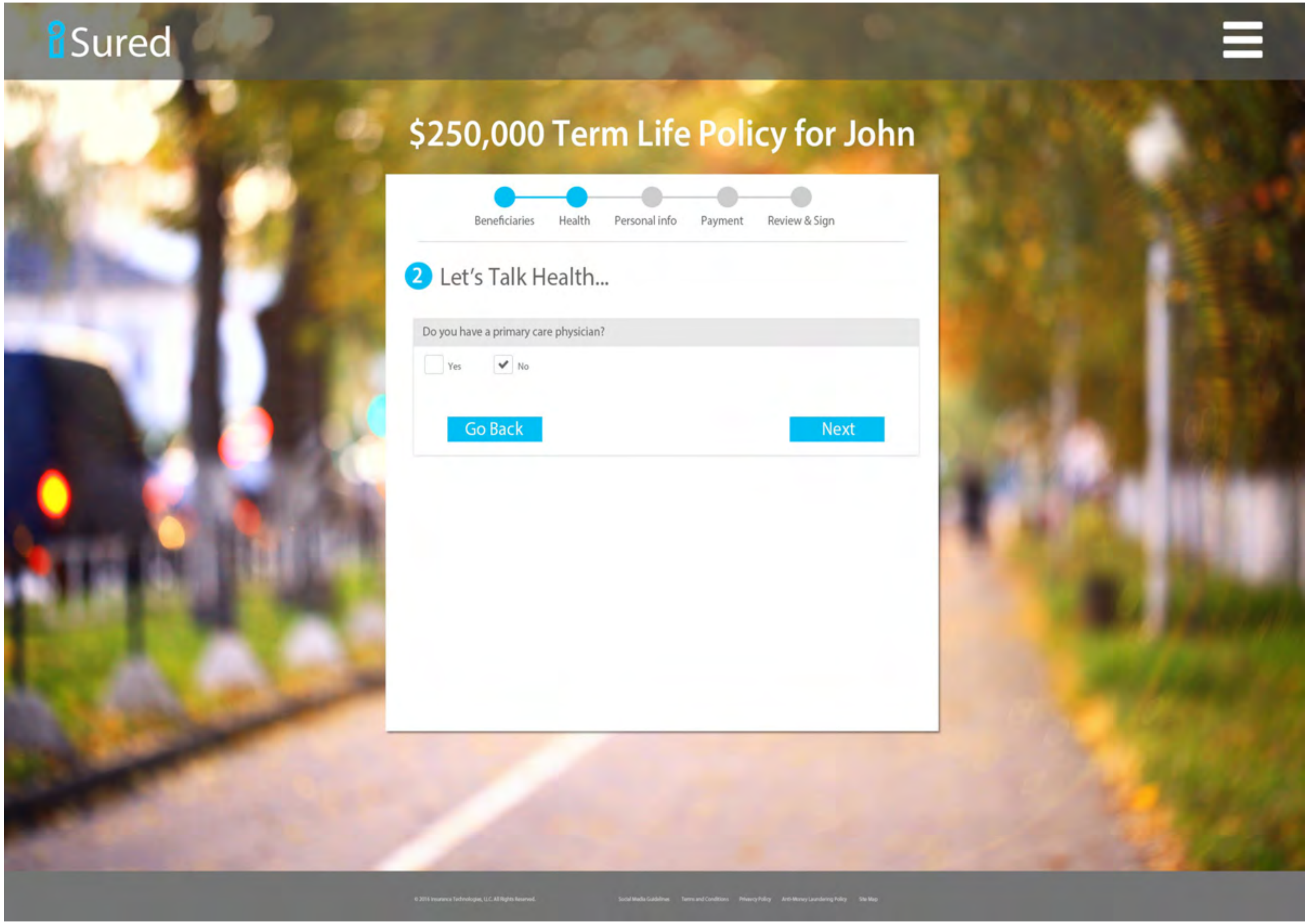


The following screens are consumer facing, but the reflexive questions are good examples and still applicable in an advisor environment.

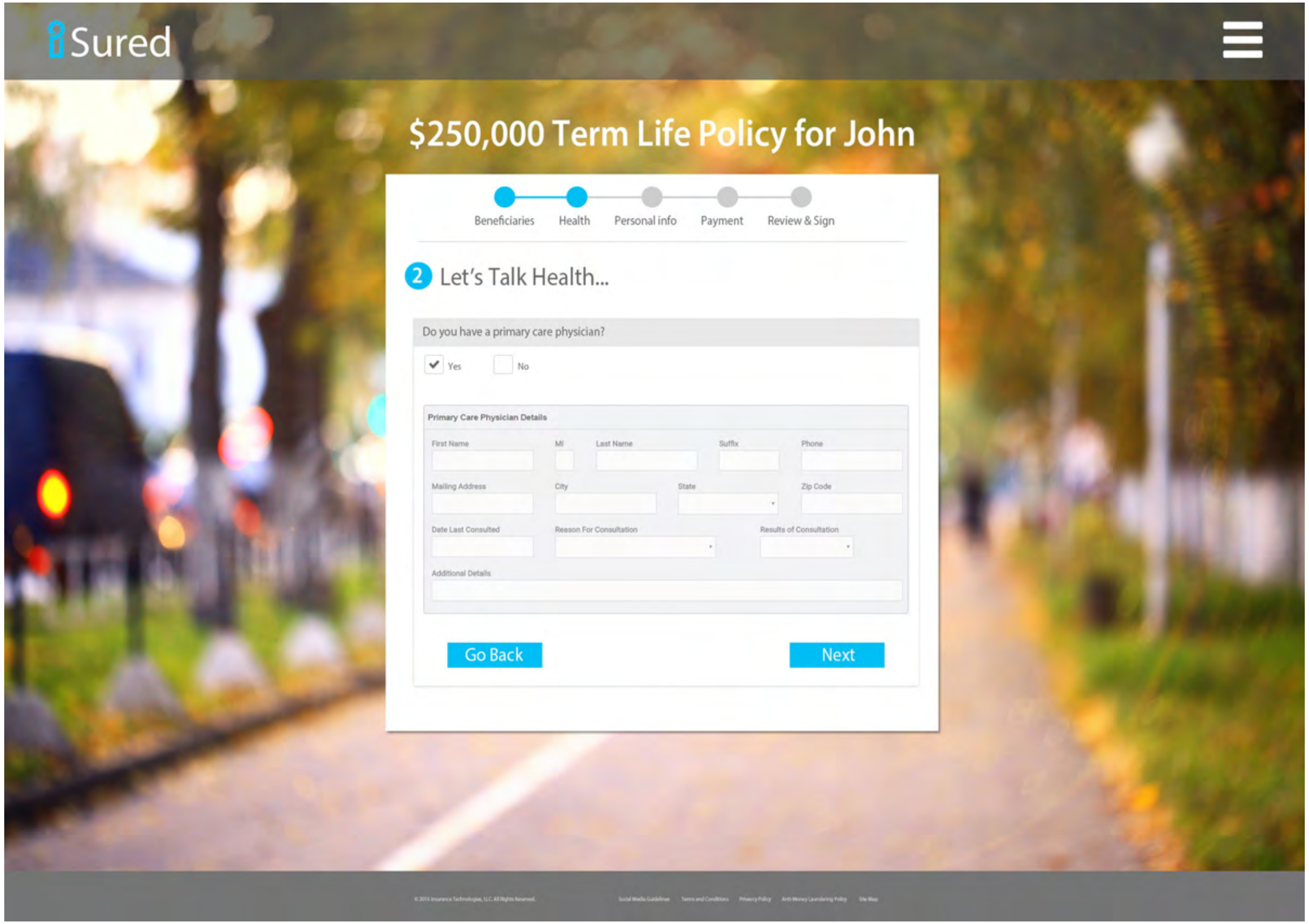
Reflexive examples for Life product



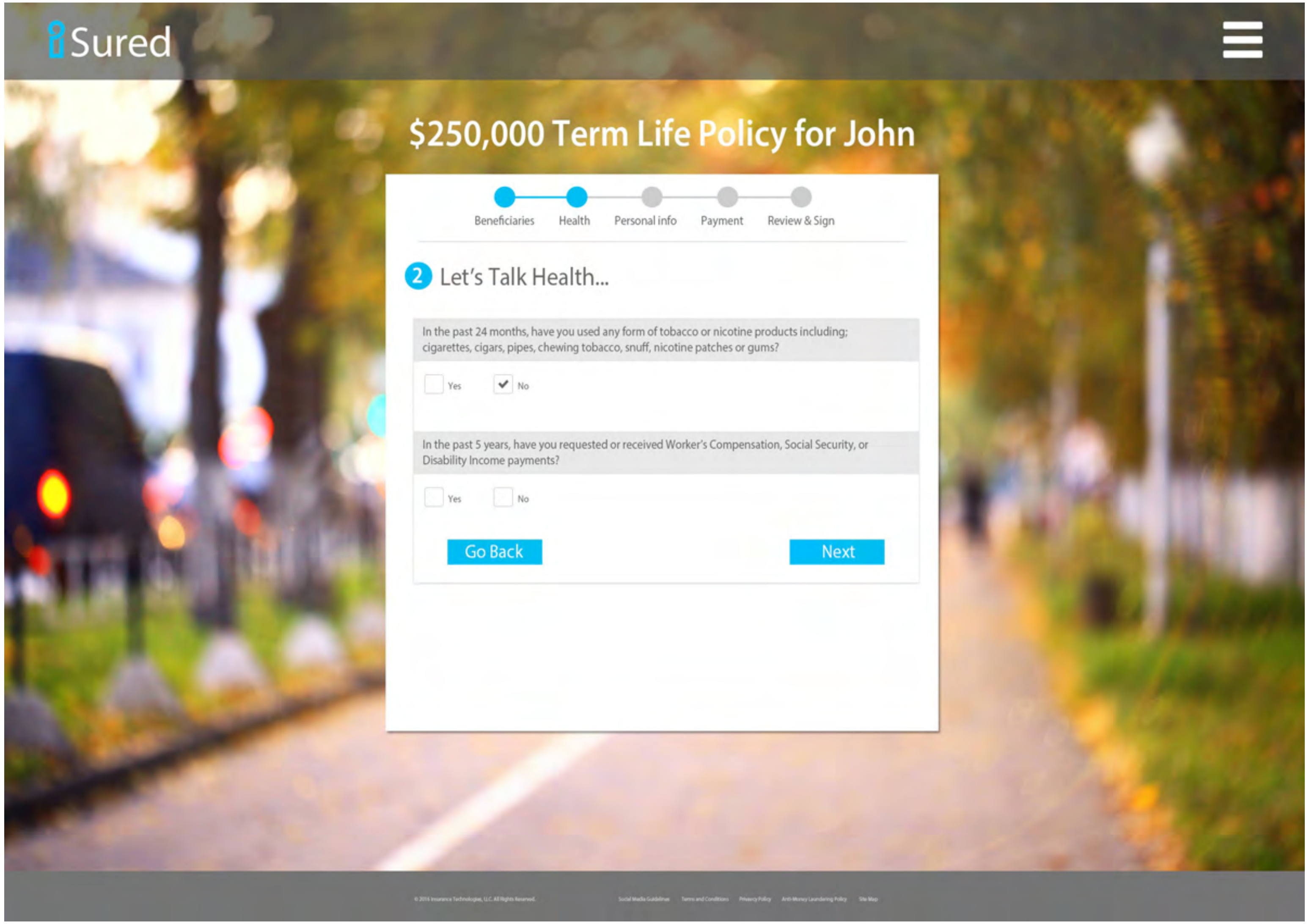
Reflexive examples for Life product



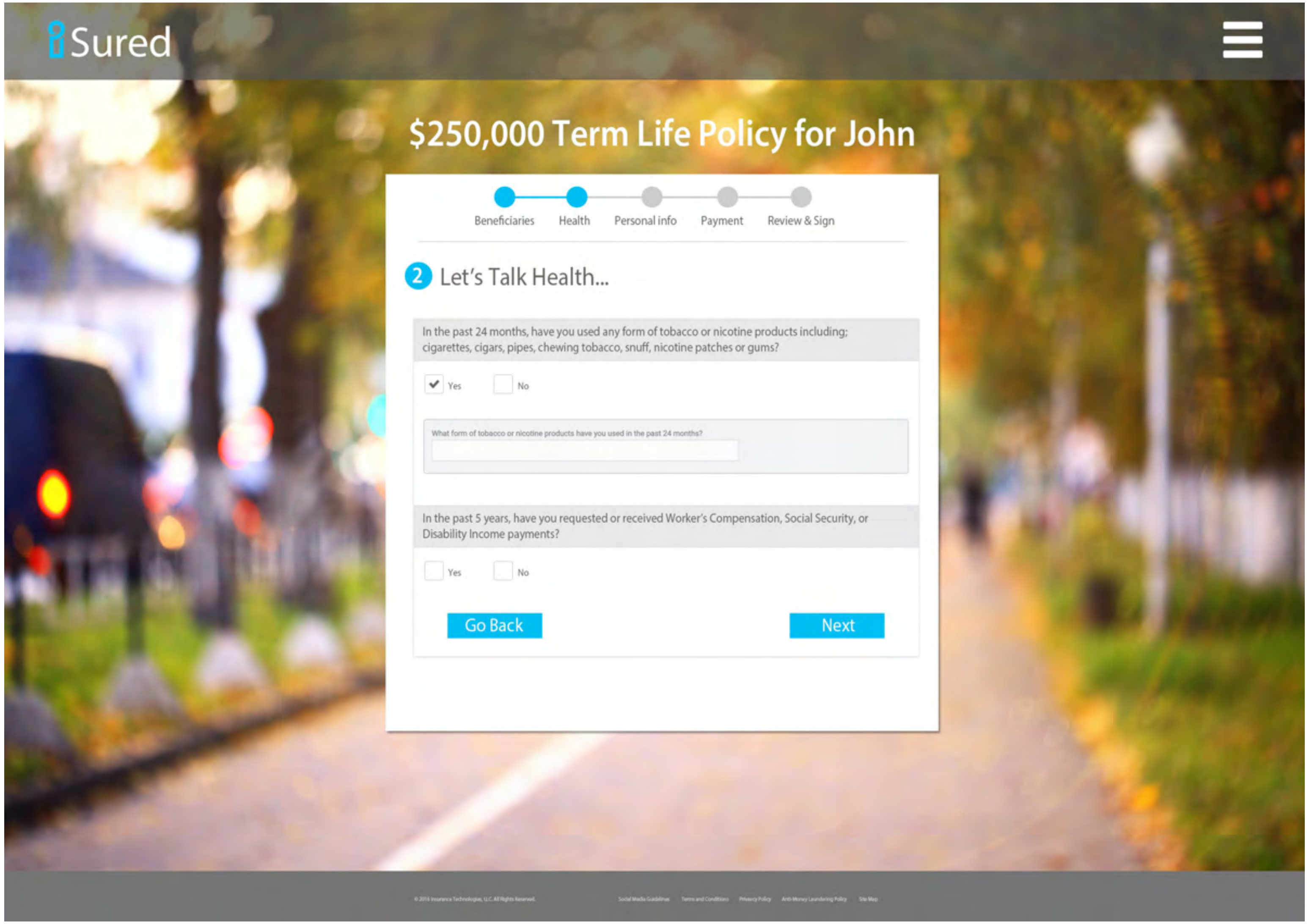
Reflexive examples for Life product



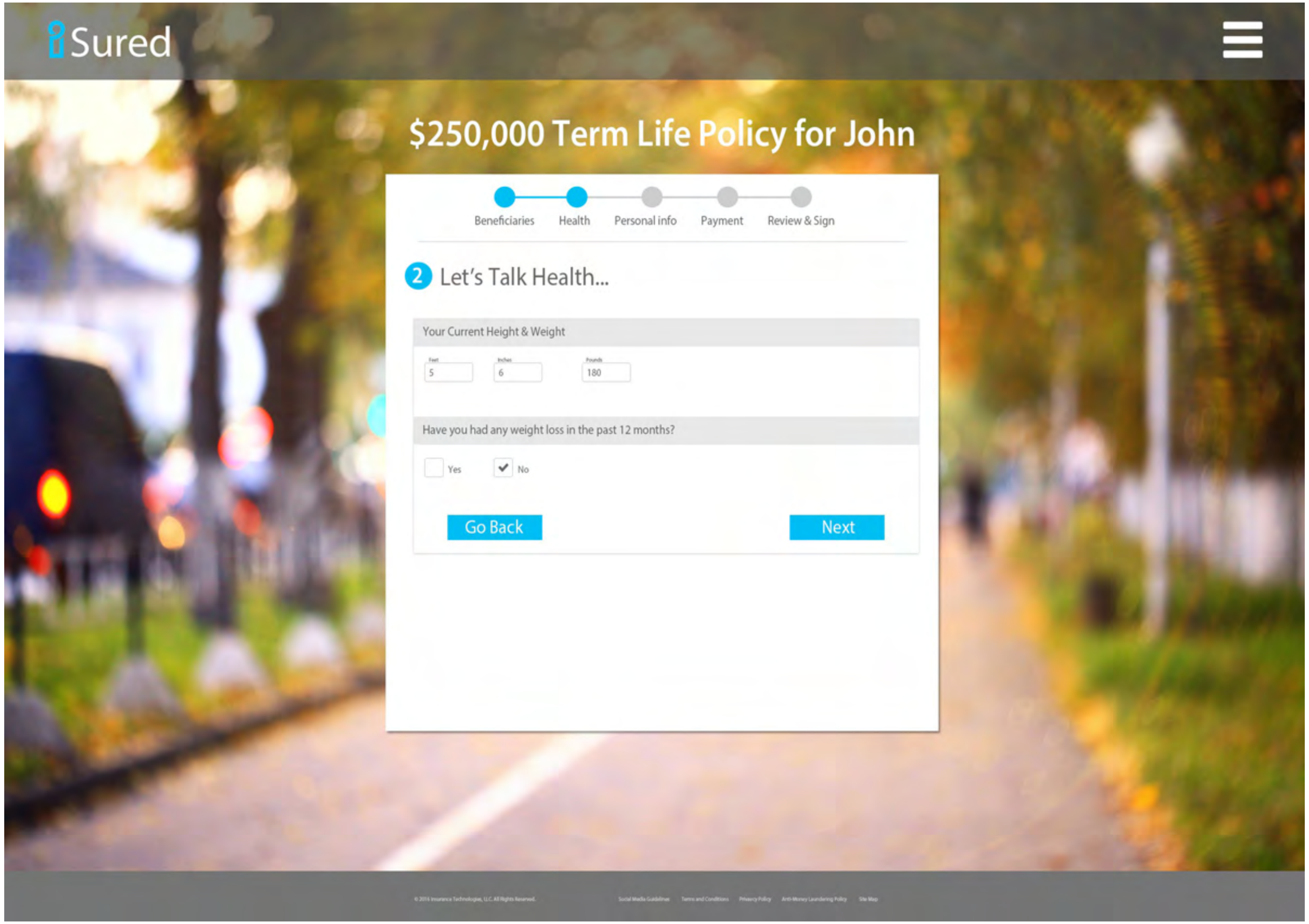
Reflexive examples for Life product



Reflexive examples for Life product



Reflexive examples for Life product



Reflexive examples for Life product