

Input Client Data (Personal)

The screenshot shows the JACKSON NATIONAL LIFE INSURANCE COMPANY website. At the top left is the JACKSON logo with 'NATIONAL LIFE INSURANCE COMPANY' underneath. At the top right is a hamburger menu icon. The main heading is 'LET'S GET STARTED!' in large white letters. Below this is a progress bar with five steps: Client (highlighted with a red dot), Needs/Goal, Product, Illustration, and Application. The current step is '1 Tell us a bit about the client', indicated by a red circle with the number 1 and a person icon. The form is titled 'Client Information' and contains the following fields: First Name, M.I., Last Name, Date of Birth (with a 'xx/xx/xxxx' placeholder), Social Security Number, Marital Status (Single and Married radio buttons), Street Address, Apartment/Unit, City, State, Zip Code, Phone, and Email. At the bottom of the form is a 'Next' button. The background of the page is a blurred image of trees with bokeh light effects.

Input Client Data (Financial)

JACKSON
NATIONAL LIFE INSURANCE COMPANY

LETS GET STARTED!

Client Needs/Goal Product Illustration Application

1 Tell us a bit about the client

Financial Profile

Annual Gross Income:

Source of Income:

Willingness to Accept Risk for Additional Financial Performance?

Aggressive Moderate Conservative

Current Investments?

Stocks/Bonds/Options Mutual Funds/CDs Annuities 401k

Real Estate Personal Business/Partnerships None

Amount/Value of current investment product: [+ Add Product](#)

[Go Back](#) [Next](#)

Gather Retirement Goals

The screenshot shows a web interface for gathering retirement goals. At the top left is the Jackson National Life Insurance Company logo. At the top right is a hamburger menu icon. The main heading is "LET'S GET STARTED!". Below this is a progress bar with five steps: Client, Needs/Goal, Product, Illustration, and Application. The "Needs/Goal" step is currently active, indicated by a red dot and a red circle around the number "2". The question is "What are the retirement goals?". The form is titled "Financial Needs" and asks for the primary financial objective. It includes checkboxes for tax deferral (with brackets 0-15%, 16-28%, 29-35%, and 36% and up), income growth, estate planning, preservation of principal, and other. There are also input fields for "Planned retirement age?" and "Desired annual income at retirement:". At the bottom of the form are "Go Back" and "Next" buttons.

Present Options Based on Retirement Age

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LETS GET STARTED!

Client Needs/Goal Product Illustration Application

3 Product Recommendations

Based upon your input, we have the following recommendations

Based upon the assets and projected income provided:

- Social Security
- IRA
- Pension
- Annuities
- Gap

-\$100,500.00
Shortfall

To meet your requirement goals, you need \$5000 per month.

Heres how we can meet that:

Retire at 55	Retire at 60	Retire at 65
Invest \$1,000 / month	Invest \$800 / month	Invest \$500 / month

Go Back Next

Present Options Based on Retirement Age Opt. 2

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LET'S GET STARTED!

Client Needs/Goal Product Illustration Application

3 Product Recommendations

Based upon your input, we have the following recommendations

Based upon the assets and projected income provided: **-\$100,500.00**
Shortfall

We recommend the following products to help you reach your goals:

Age 55 Age 60 Age 65

Product	Monthly Payment	Projected \$ at age #
Annuity Select I	\$ 2,500.00 month	Projected \$ at age #
Annuity Select II	\$ 1,500.00 month	Projected \$ at age #
Annuity Select III	\$ 750.00 month	Projected \$ at age #

Go Back Next

Illustration Method

Old/Informal Process

Based largely on Agent Opinions and Judgement – Product Driven



New/Client Centric Process

Based on Client Needs and Goals – Rules & Logic Driven

