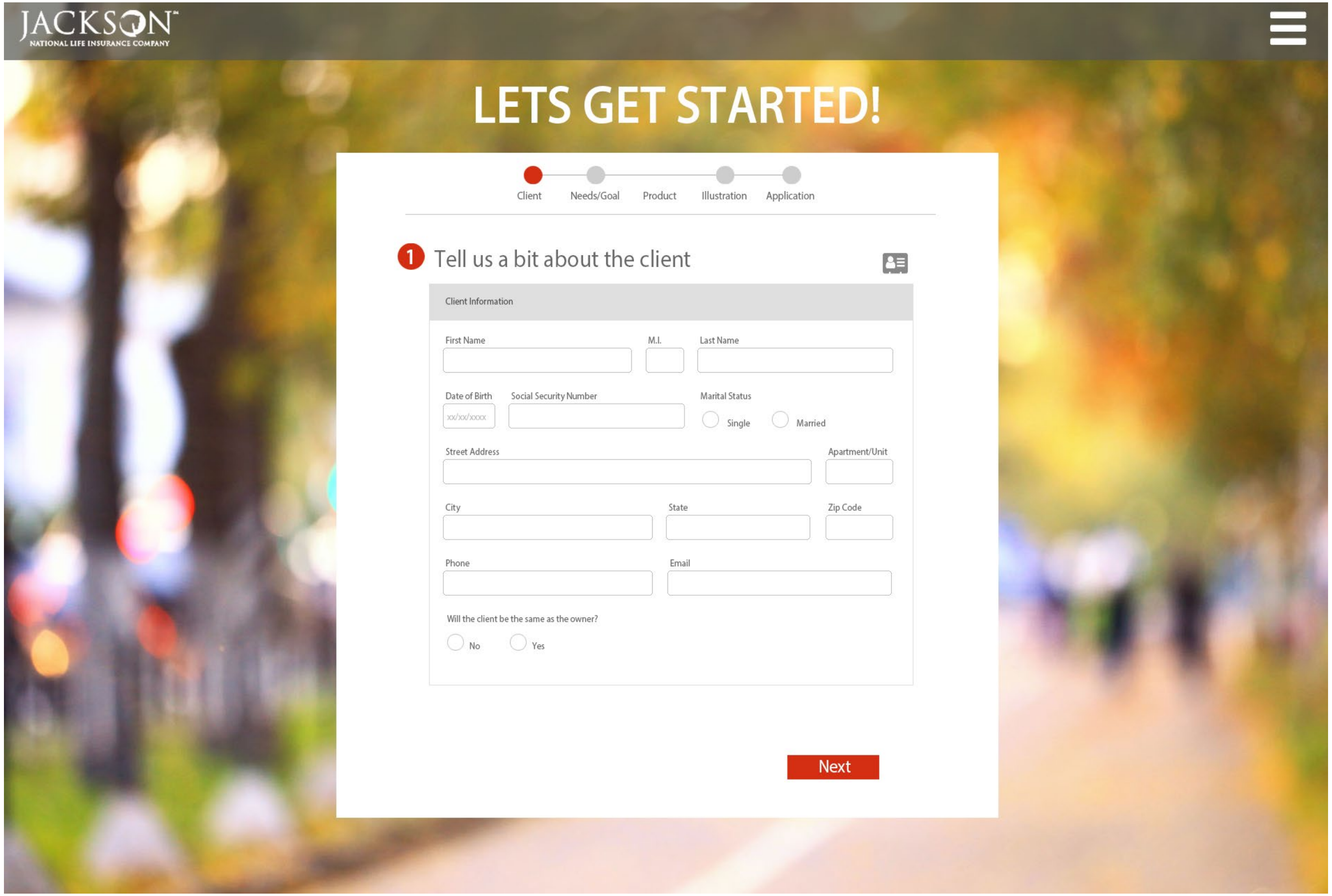
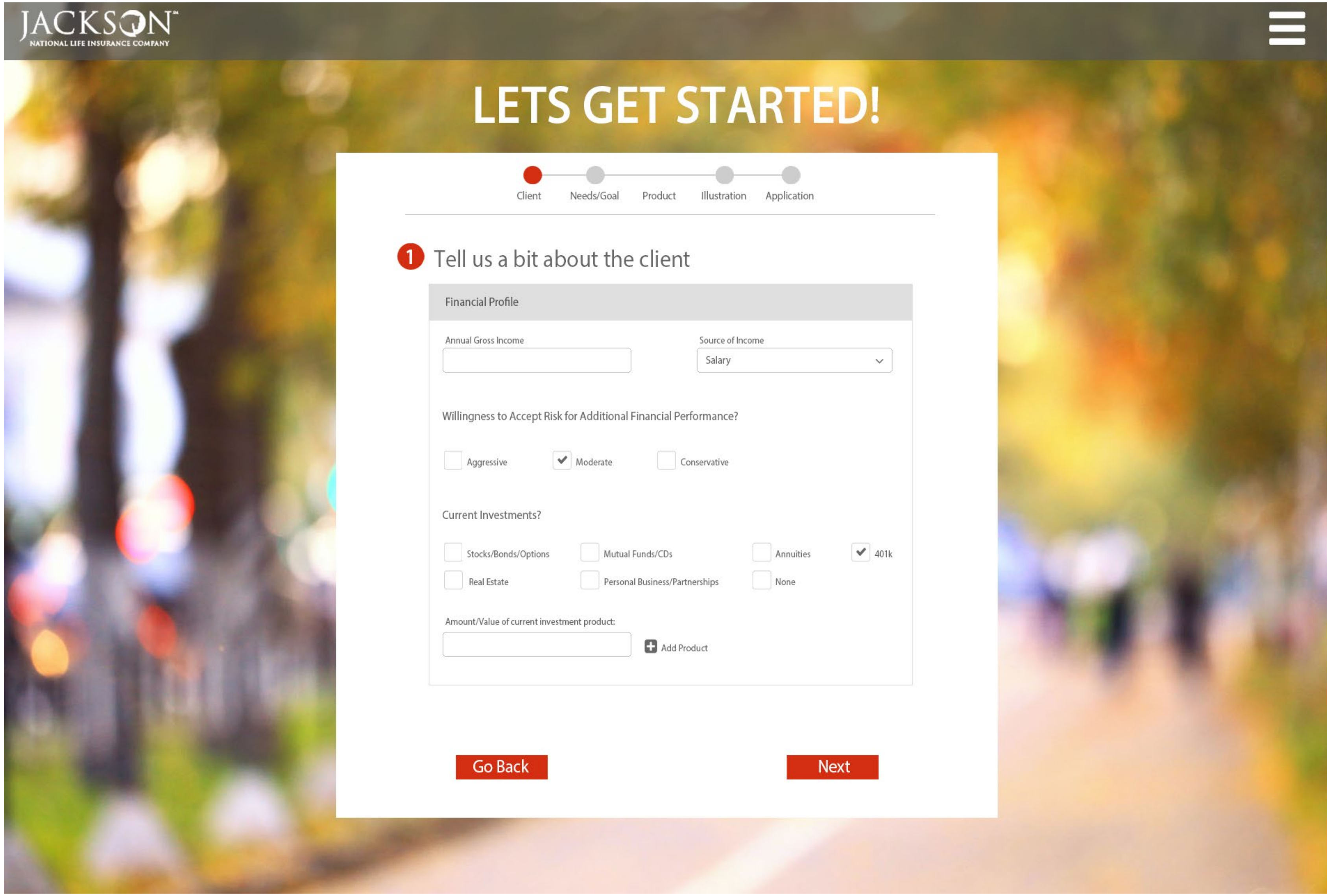
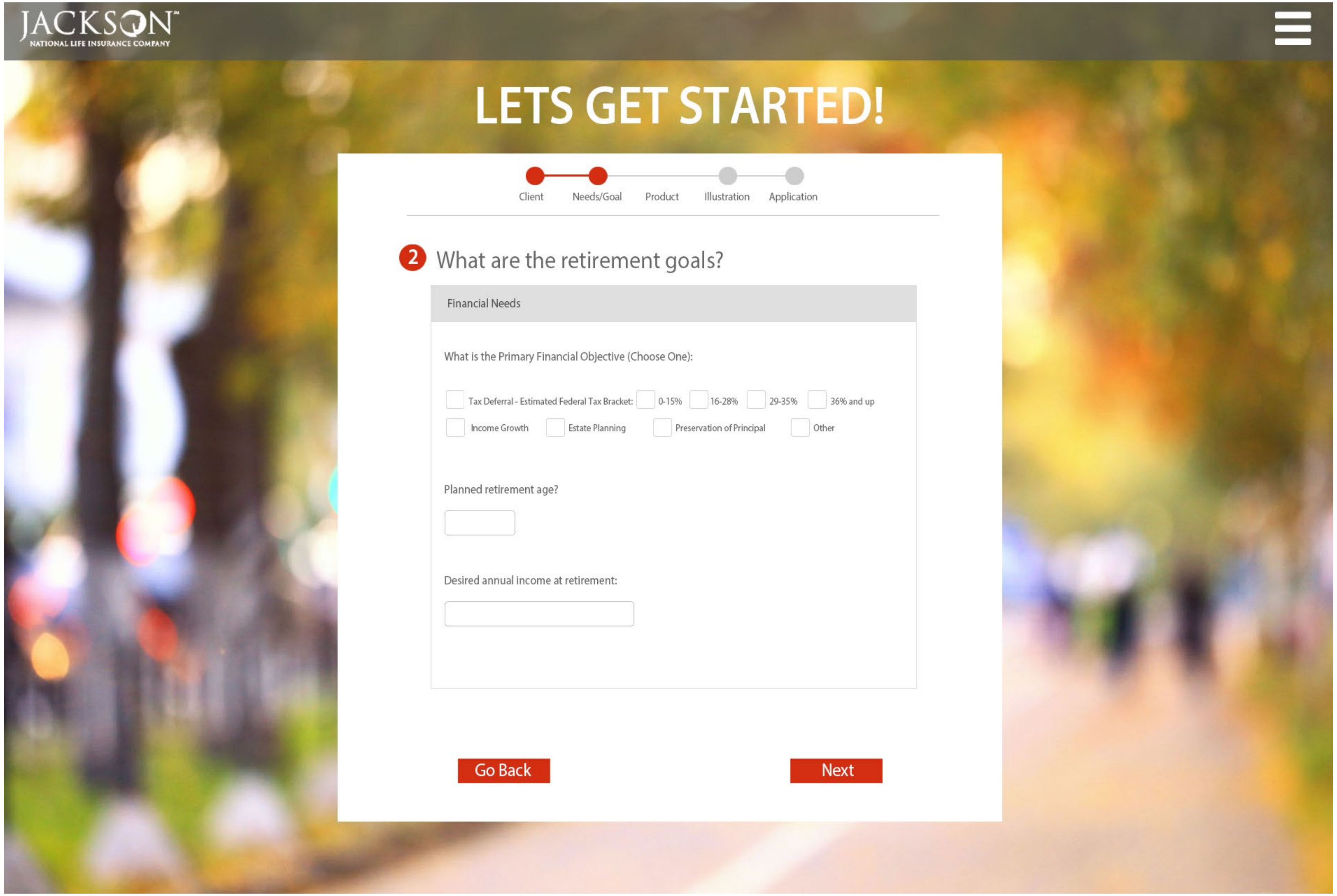
# Input Client Data (Personal)



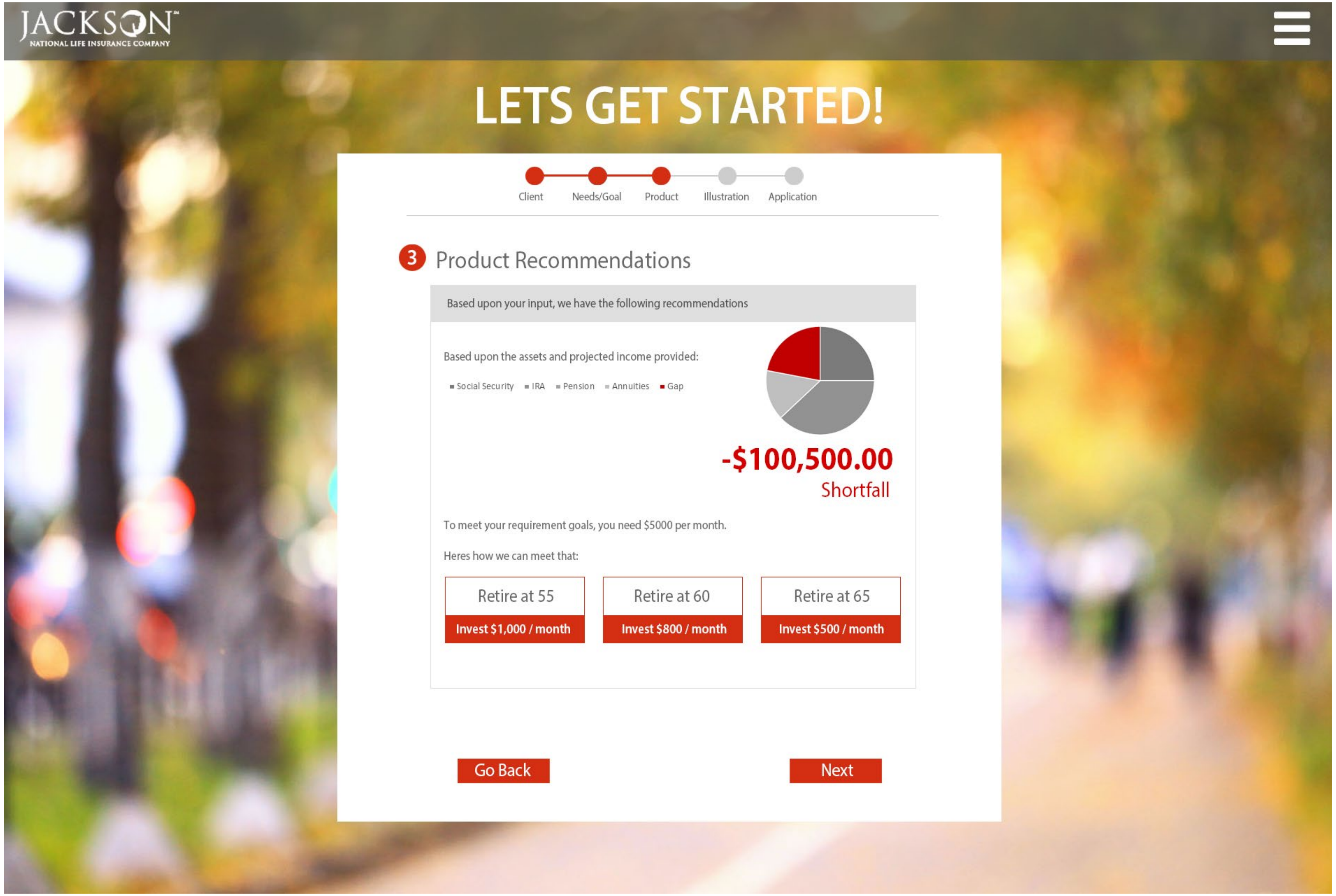
# Input Client Data (Financial)



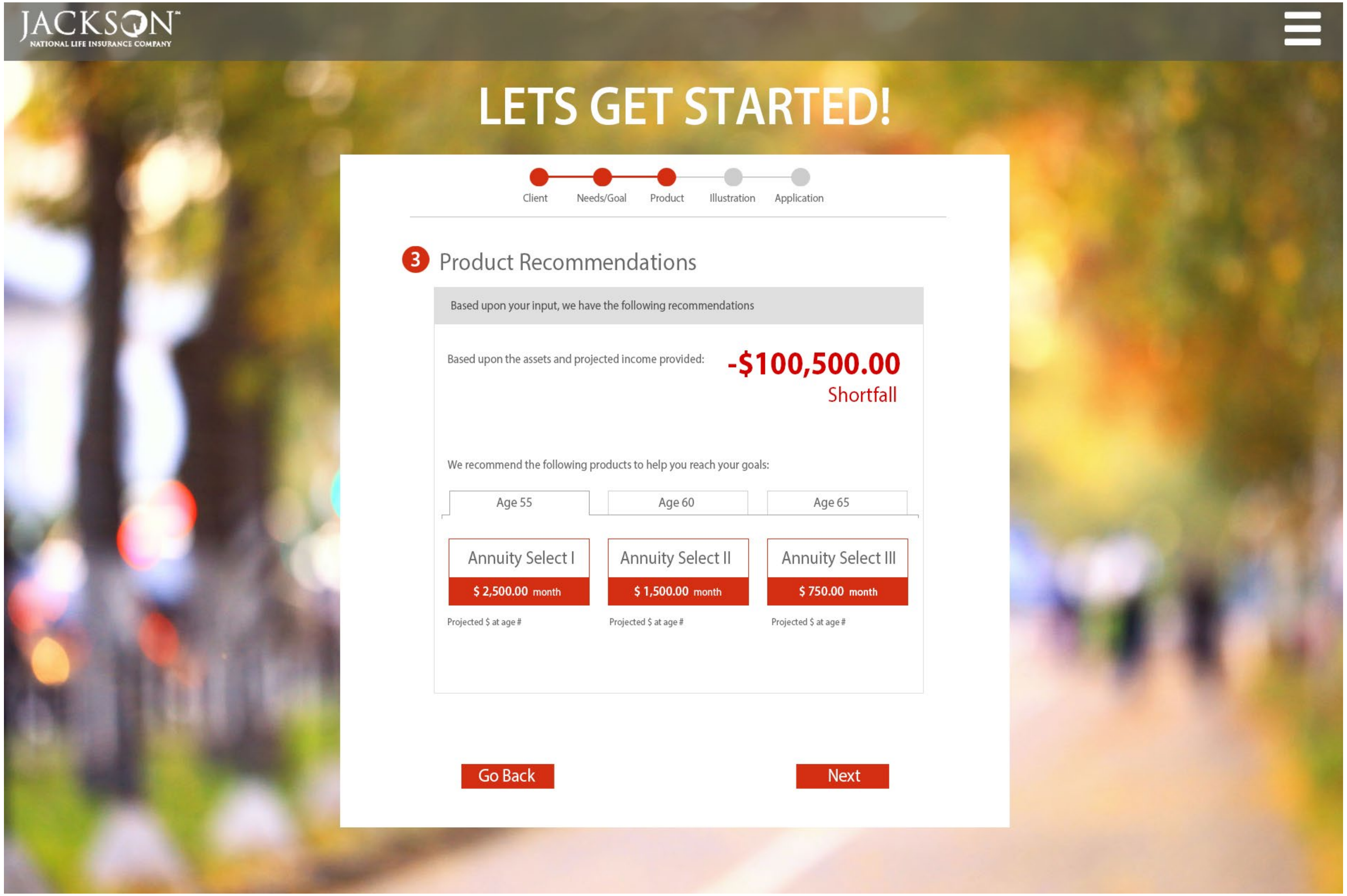
# Gather Retirement Goals



# Present Options Based on Retirement Age



# Present Options Based on Retirement Age Opt. 2



# Illustration Method

## Old/Informal Process

Based largely on Agent Opinions and Judgement – Product Driven

**Client Input** – Agent and Client Back and forth communication
›
**Illustration** – Product Based on Agent Opinion
›
**Application** – Based on Agent Selected Product

## New/Client Centric Process

Based on Client Needs and Goals – Rules & Logic Driven

**Client Input** – Know Your Client Questionnaire
›
**Needs Input** – Retirement Goal Gap Analysis
›
**Options** – Based on Input Product Selection
›
**Illustration** – Based on Selection
›
**Application** – Based on Selection