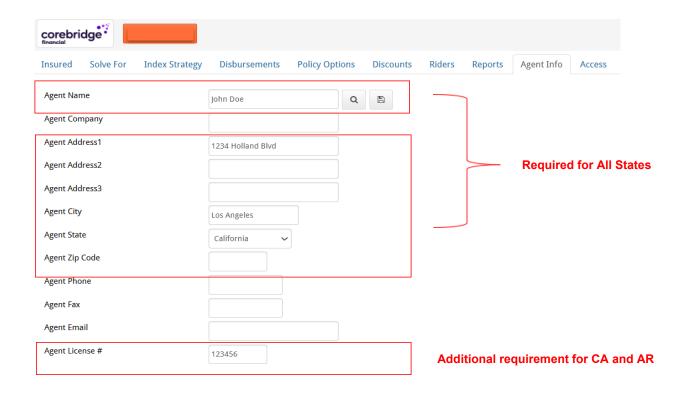


Effective December 5, 2025, New Regulatory Requirements for Agent Info to Run Illustrations and Quotations

- 1. Life Insurance Illustrations Model Regulation requires that all IUL illustrations across All States, both sales and in force, must have Agent Name and Business Address.
- 2. In addition, California and Arkansas Departments of Insurance require that all IUL illustrations in the states of California and Arkansas must also have Agent License Number.
- 3. For all **Term, GUL and Whole Life quotations** in the states of **California** and **Arkansas**, you will be prompted to enter the **Agent License Number** if you have entered the Agent Name.

See below the required fields in an IUL illustration and the next page for instructions on how to save and reuse the Agent Information:



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Here's an easy walkthrough to save your Agent Info:

- 1. Go to View > **Agent Manager** from the top blue navigation dropdown
- 2. Click on the "Add Agent" big orange button at the left column
- 3. Fill in your Agent Info fields in the pop-up and click "Save" at the bottom
- 4. Now, to set as default, check the box next to the Agent row and click on the "Set Default" text with the star
- 5. You should now see the default agent information within the blue box in the left column
- 6. Done! You should also now see this default agent information **auto-populated in the Agent Info tab of the illustrations** when you create a new product or set a product to all defaults

