

Product Bulletin

LIFE INSURANCE

25021

December 5, 2025



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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Insured Solve For Index Strategy Disbursements Policy Options Discounts Riders Reports Agent Info Access

Agent Name John Doe

Agent Company

Agent Address1 1234 Holland Blvd

Agent Address2

Agent Address3

Agent City Los Angeles

Agent State California

Agent Zip Code

Agent Phone

Agent Fax

Agent Email

Agent License # 123456

Required for All States

Additional requirement for CA and AR

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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

The screenshot shows the WinFlex Dashboard. On the left, there's a 'Shortcuts' section with icons for Illustrations, Client Manager, Agent Manager, Group Manager, User Profile, and eApp Status. On the right, there's a 'WinFlex Stats' section with a donut chart titled 'Total Runs by Product Type'. A dropdown menu is open from the 'View' button, showing options: Illustrations, Client Manager, **Agent Manager** (highlighted), Group Manager, and eApp Status. The top right shows 'TOTAL WIN 1,829' and 'AVG PREMIUM \$145,359'.

The screenshot shows the WinFlex Agent Manager interface. On the left, there's an 'Add Agent' button and a 'Default Agent' section with the following information:

- First Last
- 123 Address Rd
- City, AL 10010
- 999-999-9999
- email@email.com
- License123456

On the right, there's a table with columns: Last Name, First Name, Company, Phone, Email, Group Name, and Mod Date. The table contains one row of data:

Last Name	First Name	Company	Phone	Email	Group Name	Mod Date
Last	First		999-999-9999	email@email.com		10/30/2025 13:39

At the top of the table, there are buttons for 'Set Default' (with a star icon) and 'Delete' (with a trash icon). On the right side of the table, there are buttons for 'Assign Group' and 'Unassign Group'.