



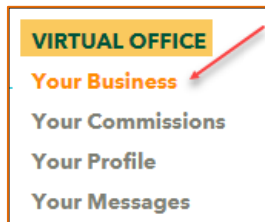
Navigating 'Your Business' in Virtual Office on the LifeSecure's Agent Portal:

'Your Business' allows you to view all business you've submitted, monitor policy status during and after the Underwriting process, view documents and upload documents.

Step 1: Access the LifeSecure website: YourLifeSecure.com

1. Go to the Secure Login in the upper right hand corner
2. Choose Agent/Agencies from the login menu
3. Below the User Name and Password area, beside First time user? "Click here" to login for the first time.
Or use this link: [First Time Agent Portal User, Click Here](#)
(Information needed: Agent/Agency number, the last 4 digits of your SSN/TIN, and the 5 digit zip code provided in your appointment request.)

Step 2: Hover over the [Virtual Office Tab](#) and click on **Your Business**



Step 3: Select the type of search you wish to utilize (you have to 2 options)

Virtual Office > Your Business ←

Your Business, as of 3/5/2018

You will have 2 options of how to search Your Business. You must select the type of search (Filters or Policy Search)

Filters | Policy Search

Specify Client and/or Business Filter(s):

- All Clients
- All Business Types
- Individual Business Only
- Multi-Life Business Only
- CORPSecure Individual Policy (99999)
- A & B Engineering -ER Contrib (10001)
- ABC Company - Employer Contrib (1001E)
- ABC Company - Individual (00012)
- Accident Fund (00002)



Option 1: Filters

To filter the options, make a selection:

Filters Policy Search

Specify Client and/or Business Filter(s):

- All Clients
- All Business Types
- Individual Business Only
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- CORPSecure Individual Policy (99999)
- A & B Engineering -ER Contrib (10001)
- ABC Company - Employer Contrib (1001E)
- ABC Company - Individual (00012)
- Accident Fund (00002)

If Selecting Filters, you must specify the type of filter, then hit 'Submit'

Reset Submit

Determine your date range:

Your Business, as of 3/5/2018 Policy Search Back

☒ Current YTD New Business ☐ All Business Since Inception ☒ Business By Date Range

New Business Sales at a Glance Filter: All Clients | All Business Types

Submitted Business		Placed Business	
Policies	Annualized Prem	Policies	Annualized Prem
33	\$21,967	3	\$1,616
26	\$11,878	6	\$4,303

Annualized premium amounts are rounded to the nearest dollar.

☒ **Business By Date Range**

From: 01/01/2018 To: 03/05/2018 Update

(If you select 'Business By Date Range', you must enter date range then click "Update")



Click on the agent name:

Your Business, as of 3/5/2018			Policy Search	Back
☒ Current YTD New Business ☐ All Business Since Inception ☐ Business By Date Range				
New Business Sales at a Glance			Filter: All Clients All Business Types	
			See next page for sub totals	
			Submitted Business	Placed Business
			Policies	Annualized Prem
			33	\$21,967
			26	\$11,878
			3	\$1,616
			6	\$4,303

Annualized premium amounts are rounded to the nearest dollar.

Click on the type of policy / application you wish to review:

Your Business, as of 3/5/2018		Policy Search	Back	Forward
Filter: All Clients All Business Types				
Show: ☒ Current YTD New Business ☐ All Business Since Inception ☐ Business By Date Range				
Policy Status		Sub-Total	Total	
Active Policies:				
Premium Paying		3		
On Waiver		0		
Paid Up		0		
Exercising NFO		0		
Active Policies, Sub-Total: \$1616.04			3	
Pending Applications:				
Pending Payment		23		
In Underwriting		0		
Requirements Outstanding		3		
Applications Pending, Sub-Total: \$17384.40			26	
Rejected Applications:				
Denied by Underwriting		0		
Withdrawn by Applicant		0		
Not Taken		3		
Free Look Cancellation		0		
All Other Rejected Applications		1		
Applications Rejected, Sub-Total: \$2966.64			4	
Terminated Policies:				
Due to Death		0		
Policies Matured or Expired		0		
Policies Lapsed		0		
Benefits Exhausted		0		
Requested Terminations		0		
All Other Terminations		0		
Policies Terminated, Sub-Total: \$0.00			0	
Total Number of Policies:			33	

Then click on the policy number, allowing you to review the policy requirements history, view documents and upload documents:

Policy Status	
Active Policies:	
Premium Paying	

For example, clicking on Active Policies would take you to...

Sort: Policy Number Descending	
within: Active	
Filter: All Clients All Business Types Current YTD New Business Active Policies	
To view or print your client's policy application, click on the PDF icon.	
• If your client signed a paper application but no PDF is present, please re-fax the paper application with wet signature to 855.351.6500 for uploading.	
• If your client used the voice authorization signature method but no PDF is present, contact your Agent Support Care line toll free at 866.582.7701.	
• If you need to find a policy by Name, please use the Policy Search feature in the upper right hand corner.	
Active Policies:	
Policy	LSQ0005042
Status	Active, Premium Paying
Client	CORP Secure Individual Policy(99999)
Product	Critical Illness Insurance
Insured	RETRIEVER COPPER #1 BEST DOG WY APT 12
Effective Date	01/11/2018
Received Date	01/09/2018
Paid to Date	03/11/2018
Annualized Premium	\$476.40
View Requirements History	
Click to see if any requirements are pending.	
View Documents	
Upload Policy Documents	
Click to upload documents	



Option 2: Policy Search

Enter the policy number or last name:

Filters

Policy Search

Specify Search Criteria:

☒ Policy Number

- OR -

☐ Insured Last Name

Select search criteria: Policy Number or Insured Last Name, then click Submit

Reset

Submit

You will then see the policy status, product type, insured information, effective date, paid to date, premium information. You will also be able to view requirements history, documents, and have the ability to upload policy documents.

Search Results for "LSQ0004438"			
Policy	LSQ0004438	Effective Date	02/25/2016
Status	Active, Premium Paying	Received Date	02/25/2016
Client	Peanut Factory(00005)	Paid to Date	12/25/2017
Product	Long Term Care - LTC I	Annualized Premium	\$297.72
Insured	Smith Hoffman fdsafd Anytown, MI 48326	View Requirements History	View Documents Upload Policy Documents

Clicking on the bolded policy number will give you access to:

Search Results for "LSQ0004438"

Policy

LSQ0004438

Effective Date

02/25/2016

- [Policy Overview](#)
(View policy status, primary insured information, benefit bank, policy issued and effective dates, paid to and billed to dates, premiums paid and claims paid, and option to upload claim documents).

Policy Overview	
Policy Number	LSQ0004438
Policy Status	A01 - Active, Premium Paying
Base Product	LSLT - Lifetime Product - LTC 1
Primary Insured	Hoffman Smith
Address	fdsafd Anytown, MI 48326
Email Address	not on file
Daytime Phone	not on file
Evening Phone	
Policy Owner	Primary Insured
Payor	Primary Insured
Agent	Tamara TrainingAgent
Address	123 Trainer Way BRIGHTON, MI 48116
Phone Number	888.888.8881
Current Benefit Bank	\$125,000
Current Monthly Benefit Access Limit	\$0
Status Effective Date	02/25/2016
Policy Issue Date	02/25/2016
Policy Effective Date	02/25/2016
Paid to Date	12/25/2017
Billed to Date	12/25/2017
Total Premiums Paid	\$545.82
Total Claims Paid	\$0.00
SUBMIT CLAIM DOCUMENTS Upload your client's completed claim form and any related documents	



- Agent Commission Split information

Agent Commission Split			
Agent	Agent Number	Contract Number	Commission Split
TrainingAgent, Tamara A	TRN001	TRN001IN01	100%

- Coverage Specifications

Coverage Summary Policy LSQ0004438 - Lifetime Product - LTC 1					
Product	Effective Date	Rating Age	Status	Benefit Amount	Annual Premium
LSLT - Lifetime Product - LTC 1	02/25/2016	27	A01 - Prem Paying	\$125,000	\$297.89
Totals, Primary Insured:					\$297.89
Coverage Specifications					
Purchased Benefit Bank	\$125,000				
Purchased Monthly Benefit Access Limit	\$				
Lapse Protection	No				
Waiting Period Days	90				
Automatic Benefit Increase Option	Not Selected				
Money Back Promise	No				
Guaranteed Future Purchase Option	Yes				
Approved Rate Class	Multi-Life				

- Premium Information

Premium Information			
Payment Information		Policy Modal Amounts	
Paid To Date	12/25/2017	Monthly	\$24.81
Billed To Date	12/25/2017	EFT or Credit Card	\$24.81
Draft Day	07	Quarterly	\$74.47
Billing Method	Electronic Funds Transfer	Semi Annually	\$148.95
Billing Frequency	Monthly	Annually	\$297.89
Last Payment Made		Premium Amounts Displayed Above Include	
Payment Method	Electronic Funds Transfer	Coupled with Policy	
Number of Months Paid	1	Marital / Coupled Discount	0%
Premium Payment Date	02/07/2018	Association Discount	10%
Payment Date	02/07/2018	'Other' Discount	0%
Payment Amount	\$24.81	Package Discount	0%
		Package Discount Date	
		Sales Tax Rate	0%
		(Included in Base Premium)	No

If you have any questions, please contact Agent Support at (866) 582-7701, option 1 then option 1 again, or email us at AgentSupport@yourlifesecure.com .