



# Partners Website Guide

## A USER GUIDE TO COLUMBIAN'S AGENT WEBSITE

**Columbian Mutual Life Insurance Company** Home Office: Binghamton, NY  
**Columbian Life Insurance Company** Home Office: Chicago, IL • Administrative Service Office: Binghamton, NY  
Columbian Life Insurance Company is not licensed in every state.

Form No. 5332 (Rev. 7/21)  
For agent use only. Not for use with consumers.

## Contents

Introduction .....	2
Getting Started .....	2
Need Help?.....	2
Agent Home Page .....	3
Contact Us.....	3
News & Alerts .....	3
View Payment by Check / View Deposit .....	4
Application History .....	4
Application Details .....	4
Applications Pending .....	4
Commissions Tab .....	5
Commission Statement.....	5
Commission Summary Report .....	5
Commission Paid Report.....	6
Daily Commission Summary.....	6
Policy Commission History .....	6
Resources Tab.....	7
Downloading Forms.....	7
Bulletins .....	7
Document Upload .....	8
Production Tab.....	9
Agent Production Reports.....	9
Managed Agent Production Reports .....	9
Policy Management Tab.....	10
Inforce & Terminated Reports .....	10
Agent Metrics.....	10
Policy Search Tab .....	11
All CFG Policy Search .....	11
Policy Details .....	11

## Introduction

Partners is Columbian's secure website for agents to view and/or download business information, bulletins, announcements and forms. The Partners Website provides 24/7 access to the current status of applications, policies and commissions for your business.

## Getting Started

To enroll in to the Partners Website, go to [cflife.com](http://cflife.com) and click on [Producer Login](#). Tap or click the "Not registered? Enroll here!" link.

**Please Log In**

User ID:

Password:

By choosing Log In, you agree to the terms of the [CFG Confidentiality of Information Agreement](#).

[Not registered? Enroll here!](#) Click here to register.

[Forget your password? Reset here!](#)

Enter the first six digits of your Columbian Agent Number, the last four digits of your tax ID, and one additional piece of identifying information: date of birth, zip code, telephone number or email address.

**User Enrollment**

**Please help us to identify you**

First SIX digits of CFG Agent Number: \*

Last four digits of tax ID: \*

Select and provide one additional piece of identifying information

Date of birth (mm/dd/yyyy): ▼ \*

Continue to set up your user ID and password.

Fields where entry is required are marked with an asterisk \* and a yellow background.

Enter only the first six digits of your agent number.

Date of birth, zip code, phone number or email address

Once you've registered, you'll set up your user ID, password and security questions for future logins.

**Please Log In**

User ID:

Password:

By choosing Log In, you agree to the terms of the [CFG Confidentiality of Information Agreement](#).

[Not registered? Enroll here!](#)

[Forget your password? Reset here!](#) Click here if you forget your password.

## Need Help?

For help with getting registered or navigating the Partners website, contact Sales Support at 800-423-9765, extension \*7582.

## Agent Home Page

Your Agent Home page will display after you log in to Partners. This page provides an overview of your application history and any pending applications, including information regarding any action needed before a policy can be issued.

The screenshot shows the Agent Home page with the following callouts:

- Change your email address here.** (Points to the 'Change it!' link under 'Is this your correct email address?')
- Change your profile here.** (Points to the 'PROFILE' link in the top navigation bar).
- Send us a message.** (Points to the 'CONTACT US' link in the top navigation bar).
- News & Alerts will show here.** (Points to the 'Agent Home' link in the left sidebar).
- View commission payment details.** (Points to the 'Get Detail' link under 'View Deposit').
- Click any link for details.** (Points to a link in the 'Application History' table).
- Your pending applications.** (Points to the 'Applications Pending' section).
- Any action needed on a pending application will be shown here.** (Points to the 'Action Needed' row in the 'Applications Pending' table).

	Week 09/24/2020 - 09/30/2020			Last 30 Days 09/01/2020 - 09/30/2020			Year to Date 01/01/2020 - 09/30/2020			Since Inception 01/01/1900 - 09/30/2020		
	Count	Premium	Face Amt	Count	Premium	Face Amt	Count	Premium	Face Amt	Count	Premium	Face Amt
Submitted (Based on submission date.)												
Accepted	0	0.00	0.00	1	3,160.95	3,192.88	22	69,520.72	70,396.19	192	909,180.40	925,895.23
Unissued	0	0.00	0.00	0	0.00	0.00	1	2,443.00	2,505.64	1	2,443.00	2,505.64
Issued & Paid (Based on production date.)												
Issued & Paid	0	0.00	0.00	1	3,160.95	3,192.88	23	69,520.72	70,396.19	192	909,180.40	925,895.23
Not Taken	0	0.00	0.00	0	0.00	0.00	1	2,443.00	2,505.64	1	2,443.00	2,505.64
Net Issued & Paid	0	0.00	0.00	1	3,160.95	3,192.88	22	69,520.72	70,396.19	192	909,180.40	925,895.23

Proceeding	-
Action Needed	-

## Contact Us

To send a secure email to the Company, click the Contact Us link at the top of the page and complete the 'Contact Us' form. Indicate your preference for the reply method (phone or fax) and include your phone or fax number as appropriate.

## News & Alerts

Any alerts from the Company will also be shown on your Home page when applicable. Examples of alerts include:

- A policy is in danger of lapsing
- An account has a balance due
- A new bulletin has been posted since the last time you logged in
- General announcements from the Company

The screenshot shows the Agent Home page with the following callouts:

- Important notices from the Company will show here.** (Points to the 'News' section header).
- Click a link to view any unread bulletin or to access any new or revised forms.** (Points to the 'Click here' link in the 'News' section).

News

37 bulletins have been issued. [Click here](#) to view.

2175 forms have been added or revised. [Click here](#) to view.

## View Payment by Check / View Deposit

The View Payment by Check and View Deposit tools allow you to view details for commission payments made by check or by deposit. Select a check or deposit from the drop down menu and click the Get Detail button.

View Payment by Check

Jul 01, 2021 317189-001 \$40.85

▼

Get Detail

View Deposit

2021-07-01

▼

Get Detail

Use drop down to select a date.

## Application History

The application history shows an overview of your business in the past week, last 30 days, year to date and since you were contracted with Columbian.

Application History												
	Week 08/27/2020 - 08/31/2020			Last 30 Days 08/02/2020 - 08/31/2020			Year to Date 01/01/2020 - 08/31/2020			Since Inception 01/01/1900 - 08/31/2020		
	Count	Premium	Face Amt	Count	Premium	Face Amt	Count	Premium	Face Amt	Count	Premium	Face Amt
Submitted (Based on submission date.)												
Accepted	<u>1</u>	2,655.47	2,674.19	<u>7</u>						906,019.45	922,702.35	
Unissued	0	0.00	0.00	0						2,443.00	2,505.64	
Issued & Paid (Based on production date.)												
Issued & Paid	<u>1</u>	2,655.47	2,674.19	<u>7</u>	9,653.13	9,722.15	<u>22</u>	68,802.77	69,708.95	<u>192</u>	908,462.45	925,207.99
Not Taken	0	0.00	0.00	0	0.00	0.00	<u>1</u>	2,443.00	2,505.64	<u>1</u>	2,443.00	2,505.64
Net Issued & Paid	<u>1</u>	2,655.47	2,674.19	<u>7</u>	9,653.13	9,722.15	<u>21</u>	66,359.77	67,203.31	<u>191</u>	906,019.45	922,702.35

## Application Details

Application History (Submitted) - Accepted, Last 30 Days (08/02/2020 - 08/31/2020)												
Policy	Insured	Annualized Premium	Face Amount	Policy Share	Submitted	Issued	Effective	Paid To	Status	Plan Name	Benefit	
<a href="#">123456789</a>	Walter White	2,281.00	2,283.28	1.0	08/06/2020	08/06/2020	08/05/2020	08/05/2038	Inforce	Elite	Full	
<a href="#">234567890</a>	Earl Grey				20	08/06/2020	08/05/2020	08/05/2043	Inforce	Elite	Full	
<a href="#">345678901</a>	Sam Green	593.00	608.21	1.0	08/18/2020	08/18/2020	08/18/2020	08/18/2052	Inforce	Elite	Full	
<a href="#">456789012</a>	Violet Hue	614.22	618.55	1.0	08/18/2020	08/18/2020	08/18/2020	08/18/2045	Inforce	Select	Full	
<a href="#">567890123</a>	Lewis Black	614.22	620.42	1.0	08/18/2020	08/18/2020	08/18/2020	08/18/2046	Inforce	Elite	Full	
<a href="#">678901234</a>	Red Buttons	614.22	620.42	1.0	08/18/2020	08/18/2020	08/18/2020	08/18/2047	Inforce	Elite	Full	
<a href="#">78901234</a>	Bert Brown	2,655.47	2,674.19	1.0	08/28/2020	08/28/2020	08/27/2020	08/27/2043	Inforce	Elite	Full	

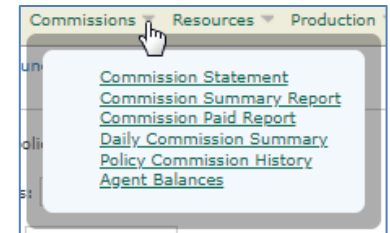
## Applications Pending

When an application is being processed, it will be shown as 'Proceeding.' If any action is needed before the policy can be issued, it will be listed as 'Action Needed' and any requirements will be shown.

Applications Pending		
Proceeding	0	-
Action Needed		-

## Commissions Tab

The Commissions tab allows you to access your Commission Statement, Daily Commission Summary and Policy Commission History, and Agent Balances, if applicable.



### Commission Statement

You can view a summary of current activity, view previous statements, or search by a date range.

**Commission Statement**

Agent:

Account:

Report Dates:

current activity

*You can request a statement spanning multiple dates by holding the **Shift** key and mouse-clicking on the beginning and end dates you choose.*

To search for a more specific range of report dates:  
 Start Date:  (MM/DD/YYYY)  
 End Date:  (MM/DD/YYYY)

**Request Report**

### Commission Summary Report

Click for:  
[Print version / PDF](#)  
[XML](#)

**Commission Summary**

**AMOUNT PAYABLE\* : \$568.70**

Description			04/01/2021 - 05/13/2021	Month To Date	Year To Date
	Beginning Balance		17.08	0.00	0.00
Less	Advance Chargebacks	-	-11.58	-11.58	-11.58
Plus	First Year Commissions	+	29.05	3.13	149.45
Less	Advances Repaid	-	-6.02	0.00	-18.30
Plus	Renewal Commissions	+	21.37	10.28	21.37
Plus	Transfers	+	278.80	-121.83	1,460.61
Plus	Bonus	+	240.00	120.00	240.00
Less	Amount Paid	-	-568.70	0.00	-1,841.55
Equals	<b>Balance Due CFG</b>	=	<b>-0.00</b>	<b>0.00</b>	<b>-0.00</b>

## Commission Paid Report

To view the Commissions Paid Report, select a date range type.

### Commission Paid Report

Display Commissions at this Amount or Higher:

\$ 0.00

Select Date Range Type:

Select a period of time or specify a date range.

☐ Last 7 Days  
☐ Last 30 Days  
☒ Last 365 Days  
☐ Date Range

Next

### Commission Paid Report from 07/02/2020 through 07/01/2021

(For paid amount \$0.00 or higher)

Agent Number	Agent Name	Manager Number	Manager Name	Last Commission Paid	Payment Frequency	Amount Paid
123456	Andy Agent	987654	Martin Manager	5/28/2021	Daily	\$34,219.74
123456	Andy Agent	987654	Martin Manager	5/26/2021	Weekly	\$12,567.80
123456	Andy Agent	987654	Martin Manager	5/26/2021	Weekly	\$10,519.15
456789	P		Ursula Upline	5/26/2021	Weekly	\$7,757.16
456789	P		Ursula Upline	5/26/2021	Weekly	\$7,186.58
123456	A		Martin Manager	5/26/2021	Weekly	\$7,032.10
789012	Ronald Representative	321987	George General	5/26/2021	Weekly	\$6,110.98
789012	Ronald Representative	321987	George General	5/26/2021	Weekly	\$6,057.83
789012	Ronald Representative	321987	George General	5/26/2021	Weekly	\$6,037.04

## Daily Commission Summary

The Daily Commission Summary shows itemized commissions for a specific date.

### Daily Commission Summary for Diversified Health Marketers Inc

Date: 07/02/2021

Agent #	Account	Hold Reason	Agent Name	Balance	Unearned Advance Balance	Agent Account Status
123456	001		Andy Agent	25.32		Active
123456	001		Andy Agent	22.82	-2,754.40	Active
123456	003		Andy Agent	29.47	-626.83	Active
123456	011		Andy Agent	0.00	-142.75	Active
123456	014		Andy Agent	22.95	0.00	Active
123456	015		Andy Agent	33.80	-1,409.57	Active
123456	016		Andy Agent	55.52	0.00	Active
123456	017		Andy Agent	9.81	0.00	Active
123456	020		Andy Agent	34.86	0.00	Active
123456	023		Andy Agent	57.22	0.00	Active
123456	024		Andy Agent	112.67	-1,647.88	Active
123456	026		Andy Agent	20.55	0.00	Active
123456	027		Andy Agent	12.68	0.00	Active
123456	030		Andy Agent	20.00	0.00	Active
123456	031		Andy Agent	10.82	0.00	Active
NET Commission:				468.49		

## Policy Commission History

The Policy Commission History allows you to look up the history for a specific policy.

### Policy Commission History

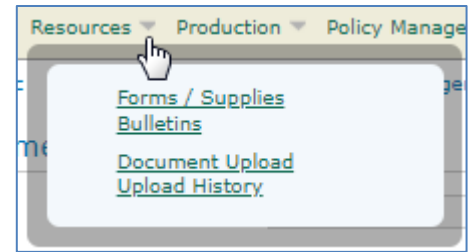
Policy

205000123456

Search

## Resources Tab

The Resources tab allows you to print or download forms, read bulletins, securely upload documents to the Company and see your upload history.



### Downloading Forms

To access forms, click on the Forms / Supplies link and choose your state from the drop down list, then click the Next button.

**Final Expense Forms for AZ**

**Instructions:** You can filter the list of forms by typing criteria into one or more of the fields:

Form Number  Title  Category

Search for a form number, name or category by entering a search term.

Click the arrow at the top of a column to sort the list.

Click a link to open or download a form.

Form Number	Title	Date	Category	Size
<a href="#">5380CFG</a> (rev. 02/2021)	<a href="#">CFG Website Flyer</a>	04/23/2021	Reference	8.5 x 11 in.
<a href="#">5374CFG</a> (rev. 02/2021)	<a href="#">Monthly EFT Face Amount Tables (FE 2020)</a>		Rate Sheets	8.5 x 11 in.
	<a href="#">Public Communications / About Columbian Brochure</a>		Reference	8.5 x 11 in.
	<a href="#">Public Communications / About Columbian - Spanish</a>	03/04/2021	Reference	8.5 x 11 in.
<a href="#">5309CFG</a> (rev. 01/2021)	<a href="#">Application Tips (FE 2020)</a>	02/05/2021	Reference	8.5 x 11 in.
<a href="#">4355CFG</a> (rev. 12/2020)	<a href="#">Needs Analysis Form</a>	01/21/2021	Forms	8.5 x 11 in.
<a href="#">4355CFG-S</a> (rev. 12/2020)	<a href="#">Needs Analysis Form - Spanish</a>	01/21/2021	Forms	8.5 x 11 in.
<a href="#">5378CFG</a> (rev. 01/2021)	<a href="#">Final Expense Agent Reference Guide (FE 2020)</a>	01/11/2021	Reference	8.5 x 11 in.
<a href="#">5379CFG</a> (rev. 01/2021)	<a href="#">Final Expense Underwriting Guidelines (FE 2020)</a>	01/11/2021	Reference	8.5 x 11 in.
<a href="#">6085-CL</a> (rev. 09/2020)	<a href="#">Telesale Procedure Guide</a>	10/19/2020	Reference	8.5 x 11 in.
<a href="#">5045CFG-AZ</a> (rev. 10/2020)	<a href="#">New Business Checklist (FE 2020)</a>	10/15/2020	Reference	8.5 x 11 in.
<a href="#">5378CFG-S</a> (rev. 07/2020)	<a href="#">Final Expense Agent Reference Guide - Spanish</a>	09/22/2020	Reference	8.5 x 11 in.

### Bulletins

The Bulletins link allows you to access any previously posted bulletin.

**Bulletins**

Bulletin Number	Title	Date
<a href="#">CLIC-21-2675</a>	<a href="#">Company Position on Policy Replacements</a>	04/05/2021
<a href="#">CFG-21-2676</a>	<a href="#">Advertising Practices</a>	03/31/2021
<a href="#">CML-21-2674</a>	<a href="#">Annual New York Reminders</a>	03/25/2021
<a href="#">CFG-20-2666</a>	<a href="#">COVID-19 Underwriting Guidelines</a>	12/02/2020
<a href="#">CML-20-2665</a>	<a href="#">NY Reg 500 Cybersecurity Training</a>	11/19/2020
<a href="#">CFG-20-2664</a>	<a href="#">Risk Assessments by Email</a>	11/13/2020
<a href="#">CFG-20-2658</a>	<a href="#">Final Expense Underwriting Improvements</a>	07/24/2020

Click a link to open a bulletin.



## Document Upload

The Document Upload feature allows you to securely upload New Business applications, Customer Service forms, Commission Administration forms or Premium Administration forms.

Simply scan or photograph documents and upload them electronically from your phone, tablet or computer. When sending photos of documents, make sure the information is legible and be sure to capture the form in its entirety, including the form number. You may attach up to ten files, but do not combine multiple insureds or policies in one transmission.

### Document Upload

This form utilizes Internet encryption technology to ensure safe and secure transmission of your documents. Complete the form and click "Upload" button. The yellow highlighted items are required.

#### Sender Details

Sender 501009 Columbian Representative

Sender Email

Sender Phone

Please enter information related to this transmission.

☐ In accordance with my Columbian agent contract and applicable regulations, I understand that I am responsible to safeguard personal customer information stored on my computer or mobile devices. I agree to immediately remove all images containing nonpublic personal information from my mobile device after the upload to CFG is completed to avoid inadvertent disclosure of such information.

Send To - Select -

Remarks

Please select no more than 10 files related to this transmission. Maximum file size is 10 Mb and maximum total upload size is 30 Mb. Allowed formats are TIFF, PDF, JPG, PNG. Do not combine multiple insureds or policies in one transmission. An image of your uploaded files will be viewable for 14 days after the upload date. A summary of your upload will be available in your Upload History for 90 days.

Select from the drop down menu

- Commission Administration
- Customer Service
- New Business
- Premium Administration

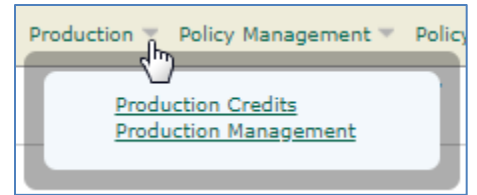
Attach up to ten PDF, JPG, PNG or TIFF forms.

When ready, click the Upload button.

A summary of your upload will be available in your Upload History for 90 days. Images are available for 14 days after upload.

## Production Tab

The Production tab allows you to view Agent Production Credits and Managed Production Credits for selected periods of time.



### Agent Production Reports

The Agent Production Credits screen allows you to see production for the period of time you choose. You can also view production for multiple periods of time to compare production. For example, you could compare the previous month's production to the same month last year.

Use the drop down menus to select a time period.

Click on any green link for details.

Select multiple periods of time for production comparisons.

Agent Production Credits

Production Credits

1 January 2020 to 30 September 2020 (274 days) Update >> Remove this block											
Personal Credits			Count	Premium	Face Amt	Managed Credits			Count	Premium	Face Amt
Submitted			23.0	71,963.72	72,901.83	Submitted			4.0	25,046.75	25,149.89
Issued & Paid			23.0	71,963.72	72,901.83	Issued & Paid			4.0	25,046.75	25,149.89
Not Taken			1.0	2,443.00	2,505.64	Not Taken			0.0	0.00	0.00
Net Issued & Paid			22.0	69,520.72	70,396.19	Net Issued & Paid			4.0	25,046.75	25,149.89

1 September 2020 to 30 September 2020 (30 days) Update >> Remove this block											
Personal Credits			Count	Premium	Face Amt	Managed Credits			Count	Premium	Face Amt
Submitted			1.0	3,160.95	3,192.88	Submitted			0.0	0.00	0.00
Issued & Paid			1.0	3,160.95	3,192.88	Issued & Paid			0.0	0.00	0.00
Not Taken			0.0	0.00	0.00	Not Taken			0.0	0.00	0.00
Net Issued & Paid			1.0	3,160.95	3,192.88	Net Issued & Paid			0.0	0.00	0.00

24 September 2020 to 30 September 2020 (6 days) Update >> Remove this block											
Personal Credits			Count	Premium	Face Amt	Managed Credits			Count	Premium	Face Amt
Submitted			0.0	0.00	0.00	Submitted			0.0	0.00	0.00
Issued & Paid			0.0	0.00	0.00	Issued & Paid			0.0	0.00	0.00
Not Taken			0.0	0.00	0.00	Not Taken			0.0	0.00	0.00
Net Issued & Paid			0.0	0.00	0.00	Net Issued & Paid			0.0	0.00	0.00

22 October 2020 to 21 October 2020 (Add dates >>)											
Personal Credits			Count	Premium	Face Amt	Managed Credits			Count	Premium	Face Amt
Submitted			0.0	0.00	0.00	Submitted			0.0	0.00	0.00
Issued & Paid			0.0	0.00	0.00	Issued & Paid			0.0	0.00	0.00
Not Taken			0.0	0.00	0.00	Not Taken			0.0	0.00	0.00
Net Issued & Paid			0.0	0.00	0.00	Net Issued & Paid			0.0	0.00	0.00

### Managed Agent Production Reports

The Managed Agent Production report is available to managers and shows production for all agents within the Agency.

Managed Agent Production

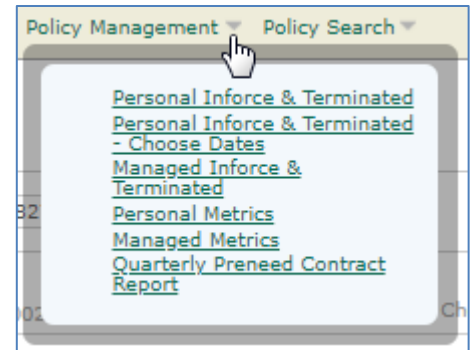
2 October 2019 to 30 September 2020 (365 days) Set dates >>

Agent		Submitted			Issued & Paid			NT/Issued	Not Taken			Net Issued		
Number	Name	Policies	Premium	Face Amt	Policies	Premium	Face Amt	Premium	Policies	Premium	Face Amt	Policies	Premium	Face Amt
Total		32.0	122,171.65	123,374.75	32.0	122,171.65	123,374.75	0.0199965	1.0	2,443.00	2,505.64	31.0	119,728.65	120,869.11
123456	Molly Marketer	28.0	97,124.90	98,224.86	28.0	97,124.90	98,224.86	0.0251532	1.0	2,443.00	2,505.64	27.0	94,681.90	95,719.22
234567	Catherine Counselor	0.0	0.00	0.00	0.0	0.00	0.00	0.0	0.0	0.00	0.00	0.0	0.00	0.00
345678	Sylvia Seller	0.0	0.00	0.00	0.0	0.00	0.00	0.0	0.0	0.00	0.00	0.0	0.00	0.00
456789	Samuel Smith Jr	0.0	0.00	0.00	0.0	0.00	0.00	0.0	0.0	0.00	0.00	0.0	0.00	0.00
567890	Andrew Advisor	0.0	0.00	0.00	0.0	0.00	0.00	0.0	0.0	0.00	0.00	0.0	0.00	0.00
678901	Samuel Smith III	0.0	0.00	0.00	0.0	0.00	0.00	0.0	0.0	0.00	0.00	0.0	0.00	0.00
789012	Peter Producer	4.0	25,046.75	25,149.89	4.0	25,046.75	25,149.89	0.0	0.0	0.00	0.00	4.0	25,046.75	25,149.89

Managers can click the dashboard symbol next to any agent's name to view the agent's dashboard.

## Policy Management Tab

The Policy Management tab allows you to view Inforce & Terminated business, past due policies and Agent Metrics. Managers can view reports for personal or managed business.



### Inforce & Terminated Reports

The Inforce & Terminated report is available for personal production or managed production.

Click for: [Print version / PDF](#) [XML](#)

This report can be downloaded to a PDF file or to a spreadsheet.

**Inforce & Terminated (Personal)** \$638,805

As Of Date:  (mm/dd/yyyy)

**Update**

Policy Year	Submitted	Not Taken	Declined	Rescinded	Deaths	Lapsed	Incomplete	Matured	Inforce
<b>Policy Counts</b>									
1	27	1	3.7%	0	0.0%	0	0.0%	0	25
2	35	0	0.0%	0	0.0%	0	0.0%	0	27
3	19	0	0.0%	0	0.0%	0	0.0%	0	12
4	22	0	0.0%	0	0.0%	0	0.0%	0	19
5	23	0	0.0%	0	0.0%	0	0.0%	0	11
<b>Total</b>	<b>126</b>	<b>1</b>	<b>0.8%</b>	<b>0</b>	<b>0.0%</b>	<b>0</b>	<b>0.0%</b>	<b>0</b>	<b>94</b>
<b>Annualized Premium</b>									
1	107,444	2,443	2.3%	0	0.0%	0	0.0%	0	102,720
2	170,930	0	0.0%	0	0.0%	0	0.0%	0	133,949
3	92,096	0	0.0%	0	0.0%	0	0.0%	0	67,458
4	126,804	0	0.0%	0	0.0%	0	0.0%	0	114,569
5	141,530	0	0.0%	0	0.0%	0	0.0%	0	60,219
<b>Total</b>	<b>638,805</b>	<b>2,443</b>	<b>0.4%</b>	<b>0</b>	<b>0.0%</b>	<b>0</b>	<b>0.0%</b>	<b>0</b>	<b>478,915</b>

### Agent Metrics

The Agent Metrics reports are designed to help producers and managers track persistency and placement ratio. Data is updated monthly.

Target Metrics show the baseline percentages which will result in an "A" or "B" score. Targets are measured against all agents' percentages and are not reflective of a product's persistency requirements.

Data as of 09/30/2020

**Target Metrics**

Target metrics are those that result in being in the top 40% of selling agents	12 Month Premium Paying Persistency	24 Month Premium Paying Persistency	Placement Ratio	Rescission Ratio
FINAL EXPENSE FULL BENEFIT	77%	67%	82%	0%
FINAL EXPENSE GRADED BENEFIT	64%	50%	79%	0%

Click for: [CSV](#)

Click to download.

Target Metrics are based on the top 40% of selling agents.

Hover over column headers for explanation of each category.

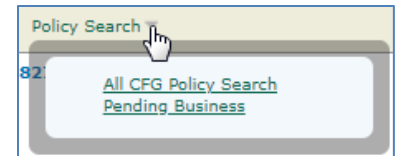
**Metrics**

Agent Id	Account Id	Product	Issue Year	12 Month Premium Paying Persistency	Score	24 Month Premium Paying Persistency	Score	Placement Ratio	Score	Rescission Ratio	Score	Applications Submitted	Not Taken	Other Applications Not Issued	Policies Issued	Premium Paying Policies Inforce	ETI & RPU Policies Inforce	Policies Issued at least 12 months prior	Premium Paying Policies after 12 months	Policies Issued at least 24 months prior	Premium Paying Policies after 24 months	Deaths during Contestable Period	Death Rescissions	Live Rescissions
123456		PREMIER MULTIPLE	2019	100%	A	100%	A	100%	A	0%	A	1	0	0	1	1	0	1	1	1	1	0	0	0
123456				82%	B	99%	B	0%	A			172	1	0	171	121	0	148	130	115	94	29	0	0
123456				62%	A	100%	A	0%	A			21	0	0	21	8	0	18	16	16	10	0	0	0

Click the plus sign for details.

## Policy Search Tab

The Policy Search tab allows you to look up policy information for in force and terminated policies and for pending business.



### All CFG Policy Search

You can search for all policies or filter your search by type or status.

Search all policies or search by policy number, name, state or zip code.

Include all statuses or filter by pending, in force or terminated status.

Managers can select "Me" or "Me and Below" to include managed business.

☒ Display Results on Screen  
☐ Download Results for Viewing  
☐ Download Results for Import

☒ Last Night (Fast) ☐ Up-To-Date (Slow)

Policy Num	Insured Last	First Name	City	State	Zip Code	Phone	Birth Date	Product	Issue Age	Effective Date	Status	Agent No	Agent
123456789	Brown	Larry	Jacksonville	FL	32246					04/28/2011	Inforce	123456	Molly Marketer
234567890					33647					02/10/2015	Inforce	123456	Molly Marketer
345678901	Grey				32223					08/18/2020	Inforce	123456	Molly Marketer
456789012	Black				32223					08/18/2020	Inforce	123456	Molly Marketer
4567890123	Tanner				32223					08/18/2020	Inforce	123456	Molly Marketer

Click a policy number for policy details.

Click a column header to sort by that column.

### Policy Details

The Policy Detail screen reflects values as of the prior month-a-versary.

123456 – Isabelle M. Insured - Final Expense (as of 06/04/2021)

#### Plan

**Product** Final Expense  
**Base Face Value** \$5,000.00  
**Total Annualized Premium** \$284.58  
**Age at Issue** 67

#### Coverages

Coverage	Face Value	Modal	Annualized	Maturity Date
Elite (Full)	\$5,000.00	\$284.58	\$284.58	07/10/2073

#### Billing Details

**Frequency** Yearly **Billing Type** Direct Bill  
**Modal Premium** \$284.58

#### Payment History

Date Paid	Due Date	Amount	Source	Status
07/20/2020	07/10/2020	284.58	Lockbox	Paid
08/28/2019	07/10/2019	284.58	CASH	Paid

#### Status

**Status** Inforce  
**Issue Date** 07/15/2019  
**Effective Date** 07/10/2019  
**Maturity Date** 07/10/2073  
**Paid to Date** 07/10/2021

#### Owner

**Name** Isabelle M. Insured  
**Address** 123 Main Street  
Anywhere, IL 12345  
**Phone** (123) 456-7890

#### Insured

**Name** Isabelle M. Insured  
**Gender** Female  
**Smoker** N  
**Date of Birth** 11/15/1951  
**Attained Age** 69

#### Payer

**Name** Isabelle M. Insured  
**Address** 123 Main Street  
Anywhere, IL 12345  
**Phone** (123) 456-7890

#### Beneficiaries

Order	Percent	Name
Primary	not specified	Benjamin Beneficiary
Primary	not specified	Brenda Beneficiary