

Variable Annuities/Life Advanced Features

The Variable Annuities/Life Advanced Module offers greater coverage of contract features, including living and death benefits in comparison to the former basic Variable Annuities/Life module. It simplifies policy comparisons with standardized descriptions, common policy terminology, and prospectus summaries.

Specific features included in the advanced module are listed below:

- ▶ Suitability Manager tool designed to facilitate client communication and document your due-diligence in VA exchange (1035 exchange) and new sales situations.
- ▶ 80+ additional policy data points, including standardized descriptions of living and death benefit guarantees and associated fees.
- ▶ Historical policy-level information that will help you pinpoint trends in the insurance market.
- ▶ Policy Comparison report for simple evaluations of up to four policies on eight types of contract features including policy benefits, fees and expenses, and investment options.
- ▶ Complete subaccount listings with the Morningstar Rating™, non-standardized returns, and detailed expense breakdowns.
- ▶ [Investment Policy Statement generator](#).
- ▶ FINRA-reviewed policy reports with comprehensive listings of associated subaccounts.

For additional training resources such as recorded training presentations, please visit principia.morningstar.com.

Need Help?

Call 312 424.4288

Monday–Friday 7am–7pm CT

Email productsupport@morningstar.com