

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

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