

# Generating illustrations efficiently



We have enhanced our illustration functionality to give you more flexibility in how you produce illustrations for your clients, giving you the chance to have more meaningful conversations with your clients through 'what if' modelling.

This is a quick glance table showing the most efficient way to produce illustrations, plus a brief summary of why each option is best for you to use. Following these routes will reduce the need to rekey information, saving you time.

Further information on how to key these instructions online can also be found in the **training section** on the Support Hub on our website.

Instruction type	Quick quote	New business application	Top up application	'What if' projections
New business - prospect client	✓	✓		
New business - existing client		✓		
New business with regular withdrawal	✓			
Top up			✓	
Transfer/re-registration		✓		
Existing client adding a new regular premium/withdrawal	✓			✓
Regular premiums existing/amending				✓
Change of adviser fee or ad-hoc fee				✓
Bed & ISA				✓
Benefit crystallisation event				✓

## Benefit of choosing this journey

- ▶ If you are submitting applications for multiple accounts use the quick quote option as this will avoid you having to re-enter data. For single applications use the new business application route.
- ▶ This is the most efficient application route and you will receive an illustration as part of this journey.
- ▶ Quick quote allows you to illustrate for new business without the need for your client's bank details.
- ▶ This is the most efficient application route and you will receive an illustration as part of this journey.
- ▶ Choosing this option will ensure you generate a pre-populated transfer authority.
- ▶ 'What If' functionality means you can model different scenarios on behalf of your clients, helping them to understand the implications of the choices they make.
- ▶ If you require a crystallisation illustration before crystallisation, then this can be obtained through the 'what if' journey. Alternatively, an illustration will be produced when keying the crystallisation online.

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