CONNECTION TO DSIGN-I TOOL

Contact Us | Français

Desjardins Insurance
Life · Health · Retirement

SECURE SECTION

Sign In

A

User ID

Password

Forgot your password?

B

Guest Access

As a guest, you can produce an illustration of our products.

To access the full range of features such as saving your illustrations, assigning or synchronizing illustrations with a local version, you must be logged in with your username and your password.

Sign In

Security | Privacy | Accessibility | Legal Notice | Extranet Access Agreement

Copyright © 2018 Desjardins Financial Security. All Rights Reserved.

Desjardins Insurance refers to Desjardins Financial Security Life Assurance Company.
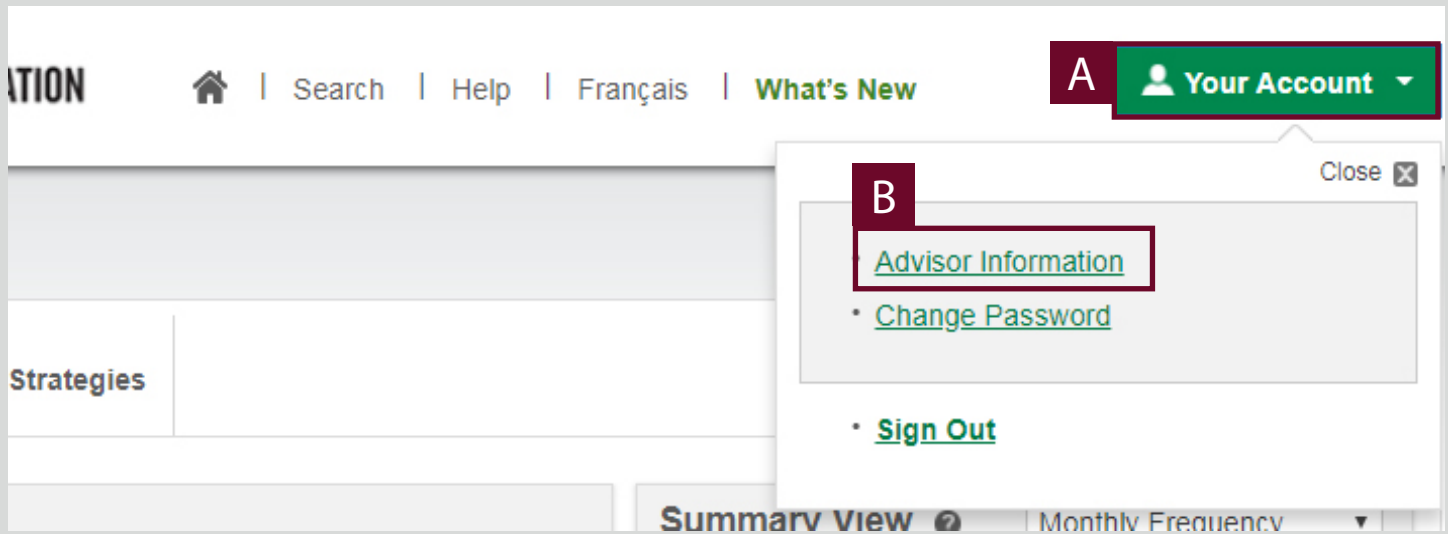
A

User ID and password.

⚠ It is not necessary to connect when accessing the tool from Webi.

B

Allow an external person to access the Insurance illustration system.

⚠ Some features are not available (e.g. : saving the illustration).

MODIFICATION OF THE PROFILE

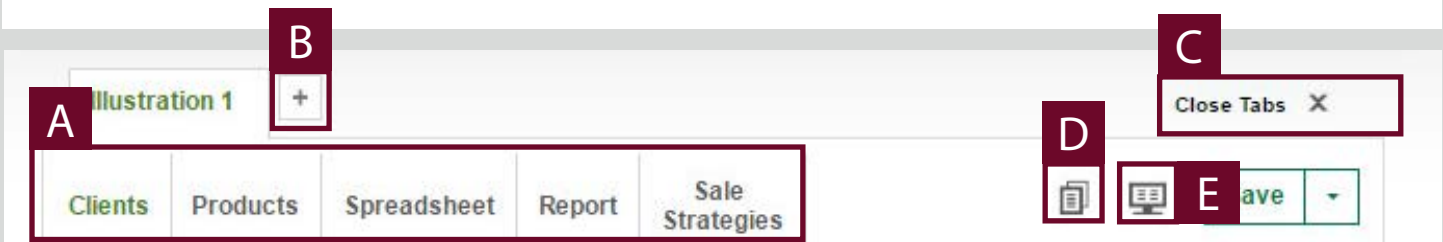
A

Allow access to the account.

B

Provides access to Advisor Information.

C

Allow to modify the information entered.

GENERAL FEATURES

Illustration 1 +

Close Tabs X

Clients | Products | Spreadsheet | Report | Sale Strategies

A

Tabs to navigate the different sections of the software and to edit information.

B

Multiple scenarios : allow working several illustrationsat the same time (for a same client or different clients).

C

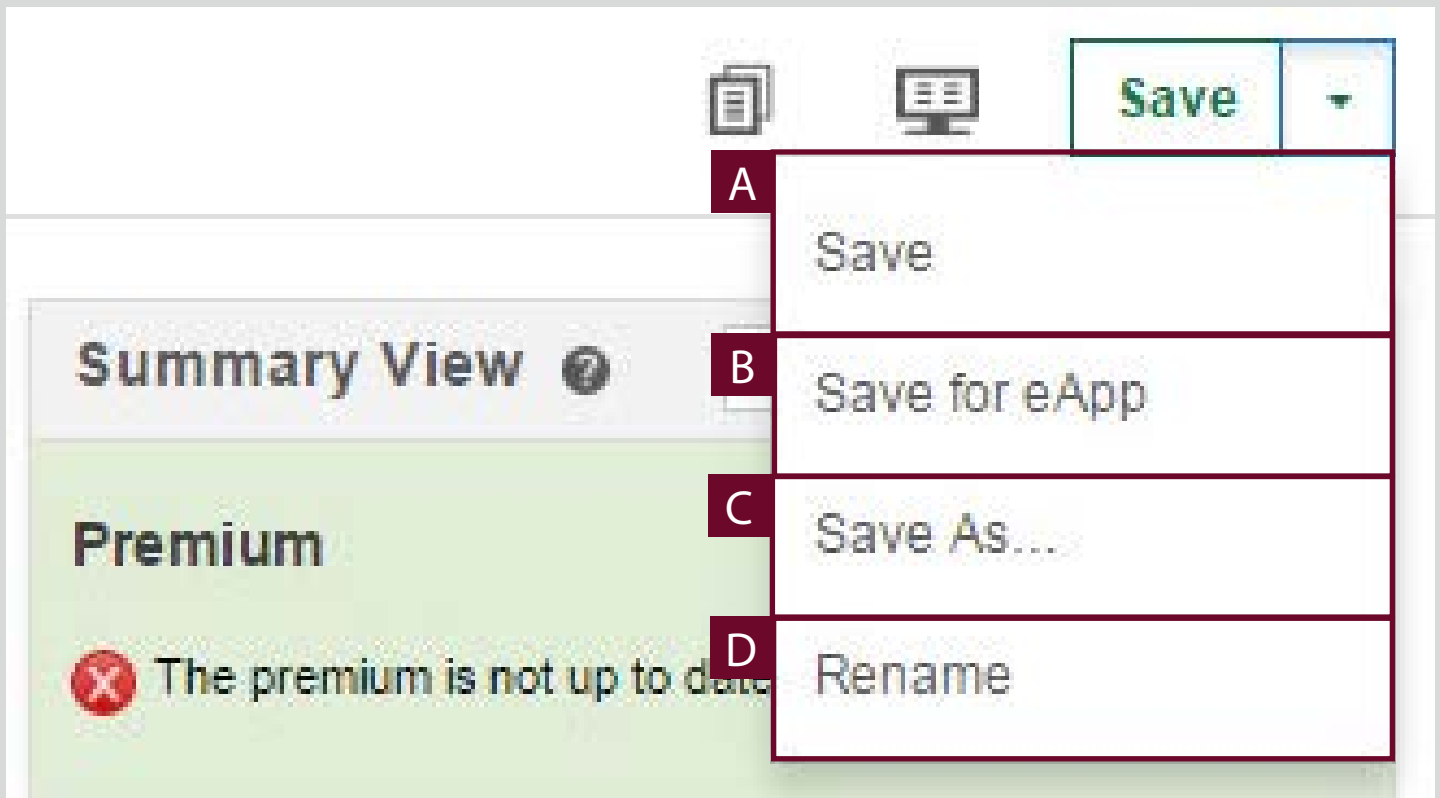Allow to close all open illustrations.

D

Allow to create an identical copy of the current Illustration to be able to offer several solutions.

E

Open the window "Visualize Summary Views". Allow to select and view several illustrations among those open.

SAVING AN ILLUSTRATION

A Allow to save an illustration.

⚠ If it's the first recording, it will be possible to name the illustration.

B Option to be selected if the client accept the illustration. Allow to save it in Zip format and then to use it in the Electronic Application.

⚠ During recording, the Zip file will directly be saved in the "Download" folder of the user's browser.

C

Allow to get an extra copy of the curent Illustration by giving it a different name.

D

Allow to rename the current illustration without having an extra copy.

⚠ The rename option is only available if you already saved the illustration.

"CLIENTS" TAB

A

Allows to add a client.
- A box identical to Client 1 will appear.

B

Selection of the policyowner(s).

(!) Generally, there is a maximum of 3 policyowners. However, it may vary depending on the plateform selected.

C

Allows to add a business policyowner.

D

Refer to summary view.

"PRODUCTS" TAB

A

Allows to adjust the frequency of the premium.

⚠ Both frequencies will be visible in the Summary view.

B

Allows to enter the issue date of the contract.

C Platforme selection:
- Life Insurance / Critical Illness
- Participating Life Insurance
- Universal Life Insurance
- Disability Insurance
- Drugs and Dental Care

"PRODUCTS" TAB

Coverage 1   Delete ⊖

A

Coverage Category
Term Life Insurance ▾

Coverage
Term 20 ▾

B

Life Option
Individual ▾

Coverage Amount   Pref. Offer ❓
$125,000 ☐

Insured
Alphonse Desjardins ▾

Gender   **C**   Rate   Extra Premium   **D**
M   P   P3 ▾   ▾

Coverage 2   Delete ⊖

Coverage Category
Permanent Life Insurance ▾

Coverage
Term to 100 ▾

Life Option
Individual ▾

Coverage Amount   Extra Premium   Conv. ❓   **E**
$125,000 ▾   ☐

Insured
Alphonse Desjardins ▾

Gender Age ❓ Rate
M   35   P

F

Options
☐ CI Advance ❓

Coverage Amount   Extra Premium

A Depending on the Coverage Category chosen, the visual of the Coverage and its options changes.

B Allows to apply the preferred offer, if needed.

C Allows to select the premium rate, if needed.

⚠ This data should stay as it appears by default. It can be modified once the client went through Selection.

D Allows to apply the extra premium, if needed.

E Allows to transform a term insurance into a permanent insurance.

F Allows to add a supplementary protection that offers a coverage for critical illnesses.

"PRODUCTS" TAB

ditional Coverage(s)	Eligible Client(s)	Amount
A		
☑ Accidental Fracture ❓	☑ Alphonse Desjardins **B** ☑ Dorimène Desjardins	----- -----
☑ Accidental Dismemberment or Loss of use ❓	☑ Alphonse Desjardins ☐ Dorimène Desjardins	**C** $20,000
☐ Accidental Death, Dismemberment or Loss of use ❓		
☐ Disability Waiver of Premiums ❓		
☐ Guaranteed Insurability ❓		
☑ Children's Life Protection ❓	☑ Alphonse Desjardins **D** ☑ Alexandre Desjardins Add a child ☐ Dorimène Desjardins	$5,000 ▼

A
Allows to select one or several complementary coverages.

⚠ The protection is not available for clients when boxes are greyed-out.

B
Allows to select the client who wants the complementary coverage(s).

C
Allows to setup the insured amount. There are 3 setup modes :
- No amount;
- Manuel entry of the amount;
- Dropdown menu with available options.

D
Allows to add one child or several children to insure.

⚠ If you forgot to add the child when you created the illustration, you can do it now by clicking **Add a child**.

SUMMARY VIEW

E Summary View ⊘

A discount is applied on the premium.

Premium	**A** $108.36 / month
If the premium is annual	$1,204.00

B	Amount	Premium / month
Alphonse Desjardins		$22.75
M / 35 / P **C**		**D**
Life T20	$125,000	$14.74
Fracture	-----	$4.05
AD	$20,000	$0.36
Children's Life	$5,000	$3.60
Dorimène Desjardins		$85.61
F / 35 / P		
Life T100	$125,000	$81.56
Fracture	-----	$4.05

A Overall Premium of the Illustration.

B Name of the insured.

C Information on the insured :
- Sex;
- Age;
- Premium rate.

D Details on the coverages related to the insured :
- Coverages;
-Amounts.

E Premium for each coverage.

D Error messages appear in this section :

- Warning message 🛈 ; usefull information about the illustration. Do not block the premium calculation

- Blocking message ❌ ; must be corrected in order to complete the Illustration.

"RESULTS" TAB

! The summary view is not visible in this tab.

A

Financial information of the illustration.

! The columns can change depending on the type of coverage selected in the « Products » tab.

B

Allows to export the data in an Excel file.

"REPORT" TAB

A

Choice of language for the report.

B

Choice of pages to include in the report.

C

Setup of the Financial Projections.

D

Production of the report in PDF format.

STRATEGIES TAB

Illustration 1	+

Clients | Products | Spreadsheet | Report | **Strategies** | A

B

Concepts

Please select... ▼

C

📊 Export

D

📄 Insured Annuity_....xlsm ^

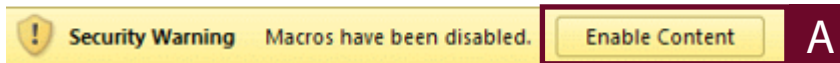---

A

Tab to illustrate concepts.

B

Concept selection.

C

Export the concept to an Excel sheet.

D

Click the link to open the Excel File

STRATEGIES TAB

Click the "Enable content" button from the notification bar.

⚠ **Security Warning**   Macros have been disabled.   [Enable Content] **A**

Information

Prepared For:	New Client1
Coverage Category:	Life Insurance
Coverage Type:	Individual
Coverage Name:	Life T20
Amount:	125 000 $

Insured

Insured name:	New Client1
Age, Sex, Rate:	35, Male, Preferred / Non-smoker

Annuity Information

The chosen annuity must be a prescribed life annuity without guaranty. In the case of joint last-to-die life insurance, the chosen annuity must be a prescribed joint life annuity without guaranty.

Annuity amount ❓	Annual income ❓	Taxable portion ❓	**B**
125 000 $	0 $	0 $	

Rate of return and Tax Information

Investment rate of return ❓	Assumed tax rate ❓
2,00 %	53,31 %

C [View the report]   [Quit]

A
⚠ Click « Enable Content » to be able to see the interaction window.

B This section must me completed.
⚠ The concept selected changes the information required.

C
Click « View the report » to generate the concept.

ILLUSTRATION(S) SEARCH

A

Search criteria.
Name : a client's family name or a company name

⚠ The parameters of language, pages to include, Financial Projections and preferences of the Commission Report are all saved by the system.

B

Advanced search criteria

C

📄➡ : Indicates if it is the electronic application (eApp)

D

Refer to Handing out an illustration.

⚠ If the illustration can't be found, it might be because it's been done on Local Mode.

HANDING OUT AN ILLUSTRATION

Search

Last Name ❓	First Name	Illustration Name	
			Search Advanced Search

A t(s)

		Policyowner Name ⬍	Illustration Name ⬍	Date ⬇	Coverage Category ⬍	Advisor ⬍	Spec. Quote ❓ ⬍
	☐	Desjardins, Alphonse	Alphonse Desjardins Term Life Insurance	November 9, 2016 09:19 AM	Term Life Insurance	Andersen, David	
A	☑	⏩ Joplin, Scott	Scott Joplin Term Life Insurance	October 27, 2016 10:42 AM	Term Life Insurance	Andersen, David	

Display 10 ▾ per page

Previous | 1 | Next

B

◂◂ Back to Illustration   Delete | **Assign** | Open

A

Allows to select the illustration to hand out.

B

Allows the handing out of the illustrations.

Assign an Illustration   Close ☒

gn lets you transfer responsibility for an illustration to another advisor or to your assistant.
Illustration has been assigned to someone else, it will appear in their Search window and **you will no longer** ess to it
n Advisor or an Admin Assistant

C

Last Name	First Name	
	david	**Search**

J Result(s)
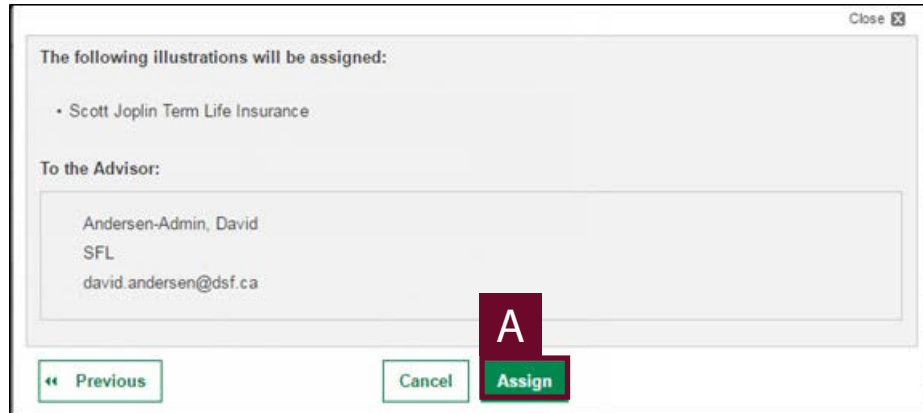
	Advisor	Financial Centre	Distribution Network	E-mail
⦿	Andersen-Admin, David		SFL	david.andersen@dsf.ca
○	Andersen-SFL, David		SFL	David.Andersen@dsf.ca
○	Andersen-State Farm, David		State Farm	David.Andersen@dsf.ca

◂◂ Previous   Cancel | **Select** **D**

C

Allows to search for the recipient of the illustration.

D

Allows to select the recipient of the illustration.

HANDING OUT AN ILLUSTRATION

A

Allows to send the selected illustration to the recipient.