

LDA DESJARDINS SPREADSHEET IMPORT GUIDE

To compare a Desjardin Whole Life plan start by adding Desjardin Whole life to your case design case in LDA.

STEP 1

Add product to Design Case

The screenshot shows the LDA software interface with a dropdown menu open under the '+ WHOLE LIFE' button. The menu lists the following products:

- Search Rates
- Canada Life Whole Life
- Manulife Whole Life
- Sun Life Whole Life
- Equitable Life Whole Life
- Empire Life Whole Life
- Desjardins Whole Life**
- London Life whole Life
- Great West Life Whole Life
- SSQ Whole Life
- Foresters Whole Life
- Industrial Alliance WL



The background shows a form with fields for 'Insurance Benefit', 'Client Age Override', 'Analyze to Age', and 'Internal Rate of Return of Cash Value Offset'.

The software now is looking for a spreadsheet from the illustration software.

DESIGN CASE

 GENERATE REPORT

▲ Desjardins Whole Life


 IMPORT SPREADSHEET FILE  PASTE SPREADSHEET DATA

Please Import spreadsheet from the Manufacturer's Illustration Software.
Need Help? Click the Video →

STEP 2 Create a Desjardin Quote

(you can include term riders, ADO, Any dividend option)

1. Create a quote, then click the **Spreadsheet** tab.

 **INSURANCE ILLUSTRATION** Search | Help | Français

New Client1 Permanent L... +

Clients | Products | **Spreadsheet** | Report

Year	Age	Duration	Annual Premium	Cumulative Premiums	Life Insurance Amount	Guaranteed Cash Surrender Value	Guaranteed Paid-up Life Insurance	Coverage Net Premium Reserve	Net A Ris
2017	50	1	\$20,940.00	\$20,940.00	\$1,000,000	\$0.00	\$0.00	\$0.00	\$1.00
2018	51	2	\$20,940.00	\$41,880.00	\$1,000,000	\$0.00	\$0.00	\$27,969.64	\$9
2019	52	3	\$20,940.00	\$62,820.00	\$1,000,000	\$0.00	\$0.00	\$55,939.29	\$9
2020	53	4	\$20,940.00	\$83,760.00	\$1,000,000	\$0.00	\$0.00	\$83,908.93	\$9
2021	54	5	\$20,940.00	\$104,700.00	\$1,000,000	\$15,750.00	\$0.00	\$111,878.58	\$8

2. Now click the **Export to Excel**.



3. Copy all the data.

The screenshot shows the Microsoft Excel interface. The ribbon includes File, Home, Insert, Page Layout, Formulas, Data, and Review. A yellow warning bar at the top reads "Protected View This file originated from an Internet location and might be unsafe". The active cell is A1, containing the text "Year". A table of data is displayed, with columns A through G. The data includes years from 2017 to 2033, ages, durations, and various financial values. A context menu is open over the table, with the "Copy" option highlighted in yellow.

	A	B	C	D	E	F	G
1	Year	Age	Duration	Annual Premium	Accumulated Premium	Prereserved	Annual Cash Surrender
2	2017	50	1	20,940.00	20,940.00	#####	0.00
3	2018	51	2	20,940.00	41,880.00	#####	0.00
4	2019	52	3	20,940.00	62,820.00	#####	0.00
5	2020	53	4	20,940.00	83,760.00	#####	0.00
6	2021	54	5	20,940.00	104,700.00	#####	15,750.00
7	2022	55	6	20,940.00	125,640.00	#####	20,030.00
8	2023	56	7	20,940.00	146,580.00	#####	25,490.00
9	2024	57	8	20,940.00	167,520.00	#####	32,430.00
10	2025	58	9	20,940.00	188,460.00	#####	41,260.00
11	2026	59	10	20,940.00	209,400.00	#####	52,490.00
12	2027	60	11	20,940.00	230,340.00	#####	65,380.00
13	2028	61	12	20,940.00	251,280.00	#####	81,460.00
14	2029	62	13	20,940.00	272,220.00	#####	#####
15	2030	63	14	20,940.00	293,160.00	#####	#####
16	2031	64	15	20,940.00	314,100.00	#####	#####
17	2032	65	16	20,940.00	335,040.00	#####	#####
18	2033	66	17	20,940.00	355,980.00	#####	#####

4. Paste it in the **Paste Data** area.

Desjardins Whole Life

IMPORT SPREADSHEET FILE PASTE SPREADSHEET DATA 1

Paste the whole exported spreadsheet in the box *

467,195.94	0.00	418,800.00	0.00						
2061	94	45	0.00	418,800.00	1,000,000.00	919,600.00	1,000,000.00	906,717.81	9
489,829.00	0.00	418,800.00	0.00						
2062					1,000,000.00	935,150.00	1,000,000.00	913,129.52	8
512,6									
2063					1,000,000.00	950,960.00	1,000,000.00	919,274.38	8
535,6									
2064					1,000,000.00	967,030.00	1,000,000.00	925,215.18	7
558,									
2065					1,000,000.00	983,380.00	1,000,000.00	931,055.92	6
581,4									

Undo Ctrl+Z

Redo Ctrl+Shift+Z

Cut Ctrl+X

Copy Ctrl+C

Paste Ctrl+V 2

Paste as plain text Ctrl+Shift+V

Select all Ctrl+A

Spellcheck

Writing Direction

Inspect Ctrl+Shift+I

3 UPLOAD

Please Import spreadsheet from the Manufacturer's Illustration Software.
Need Help? Click the Video →

5. Now click **Upload**.

Please contact info@lifedesignanalysis.com if you have any questions.