

# LDA MANULIFE SPREADSHEET IMPORT GUIDE

To compare a Manulife Whole Life plan start by adding Manulife 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 navigation bar at the top containing buttons for '+ UNIVERSAL LIFE', '+ WHOLE LIFE', '+ CRITICAL ILLNESS', '+ MANUAL', and '+ COMPARISON'. Below the navigation bar, a dropdown menu is open under the '+ WHOLE LIFE' button, listing the following products: Search Rates, Canada Life Whole Life, Manulife Whole Life (highlighted in yellow), 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, and Industrial Alliance WL. The background shows a table with columns for 'Benefit', 'Override', 'Age', 'Analyze Years', 'Internal Rate of Return of Cash Value Offset', and 'Internal Rate of Return of Insurance Benefit Offset'.

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

## DESIGN CASE

 GENERATE REPORT


Manulife Whole Life

 IMPORT SPREADSHEET FILE  PASTE SPREADSHEET DATA

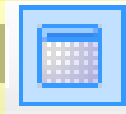
Please Import spreadsheet from the Manufacturer's Illustration Software.  
Need Help? Click the Video →

### STEP 2 Create a Manulife Quote in the illustration software (you can include term riders, ADO, Any dividend option)

1. Create a quote, then click the **Table icon** button.

 Manulife - Performax Gold - Custom [Document

File Edit Go To Report Advisor Tools Mark

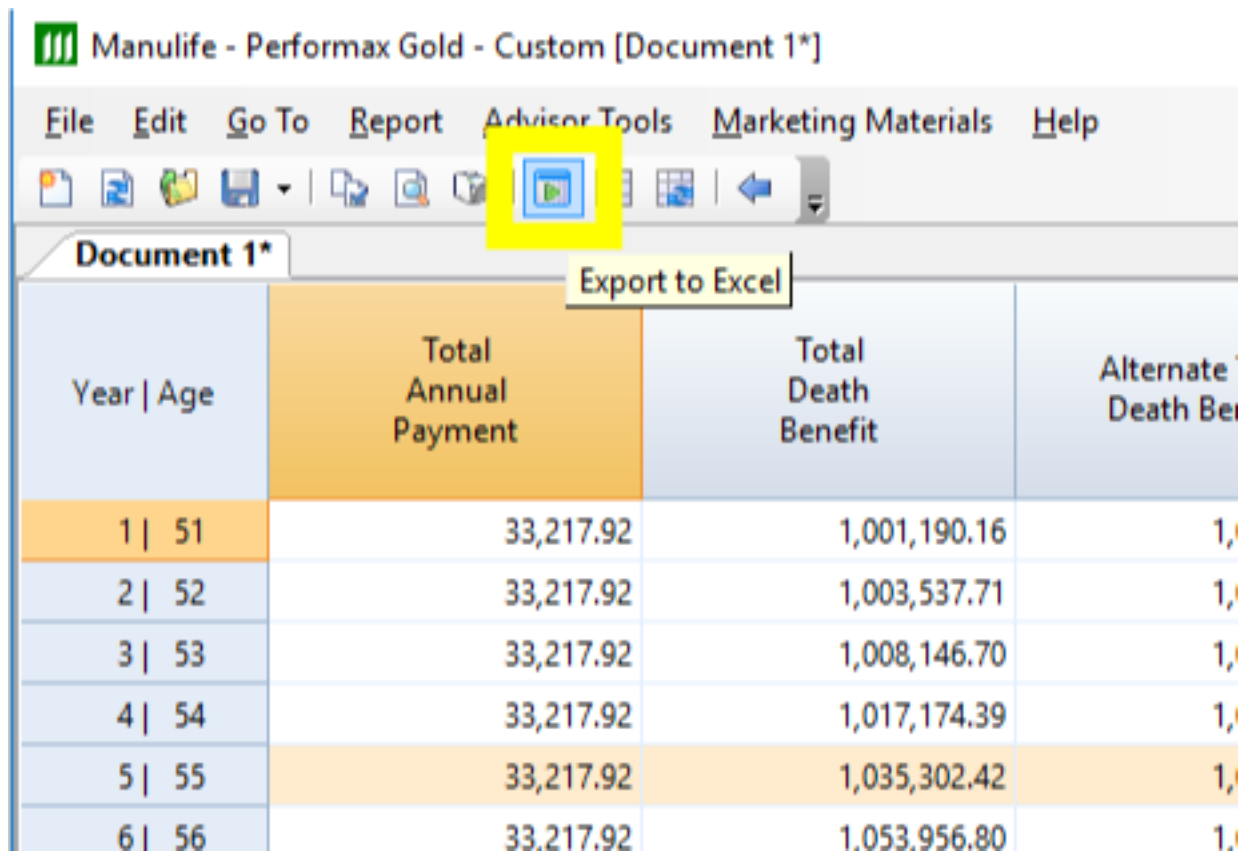


Document 1\*

Product: Performax Gold

Designed for:

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



Manulife - Performax Gold - Custom [Document 1\*]

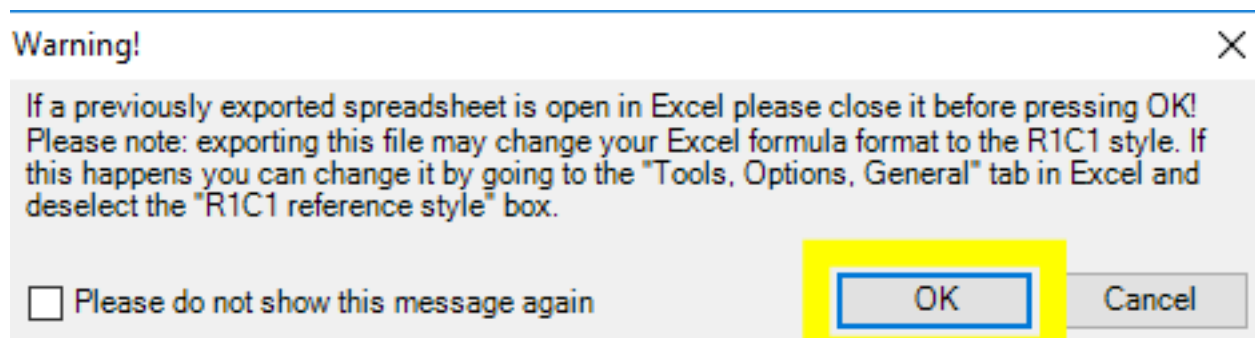
File Edit Go To Report Advisor Tools Marketing Materials Help

Document 1\*

Export to Excel

Year   Age	Total Annual Payment	Total Death Benefit	Alternate Death Benefit
1   51	33,217.92	1,001,190.16	1,001,190.16
2   52	33,217.92	1,003,537.71	1,003,537.71
3   53	33,217.92	1,008,146.70	1,008,146.70
4   54	33,217.92	1,017,174.39	1,017,174.39
5   55	33,217.92	1,035,302.42	1,035,302.42
6   56	33,217.92	1,053,956.80	1,053,956.80

3. Click ok to the warning (it just means if there is a spreadsheet exported previously it won't work).



Warning! ×

If a previously exported spreadsheet is open in Excel please close it before pressing OK!  
Please note: exporting this file may change your Excel formula format to the R1C1 style. If this happens you can change it by going to the "Tools, Options, General" tab in Excel and deselect the "R1C1 reference style" box.

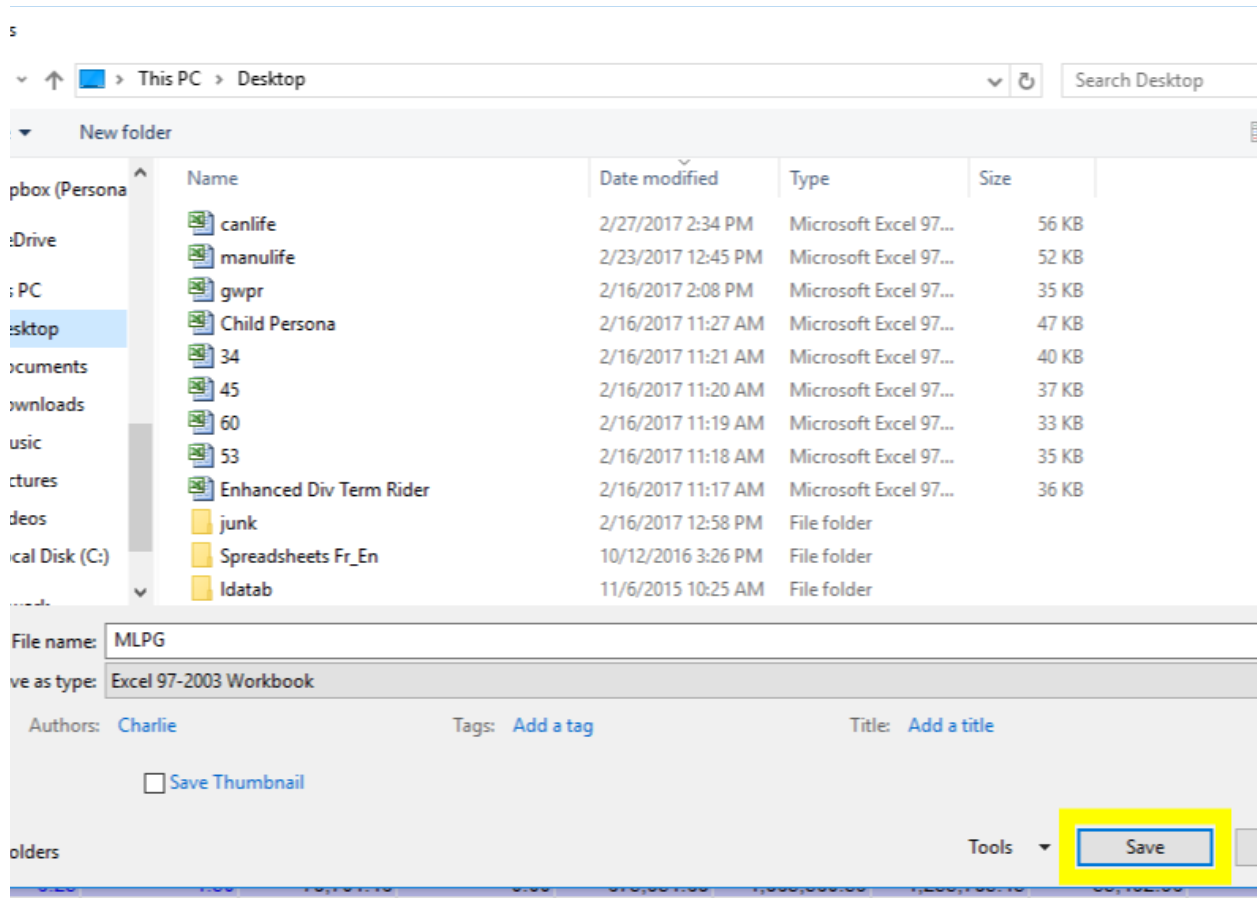
Please do not show this message again

**OK** Cancel

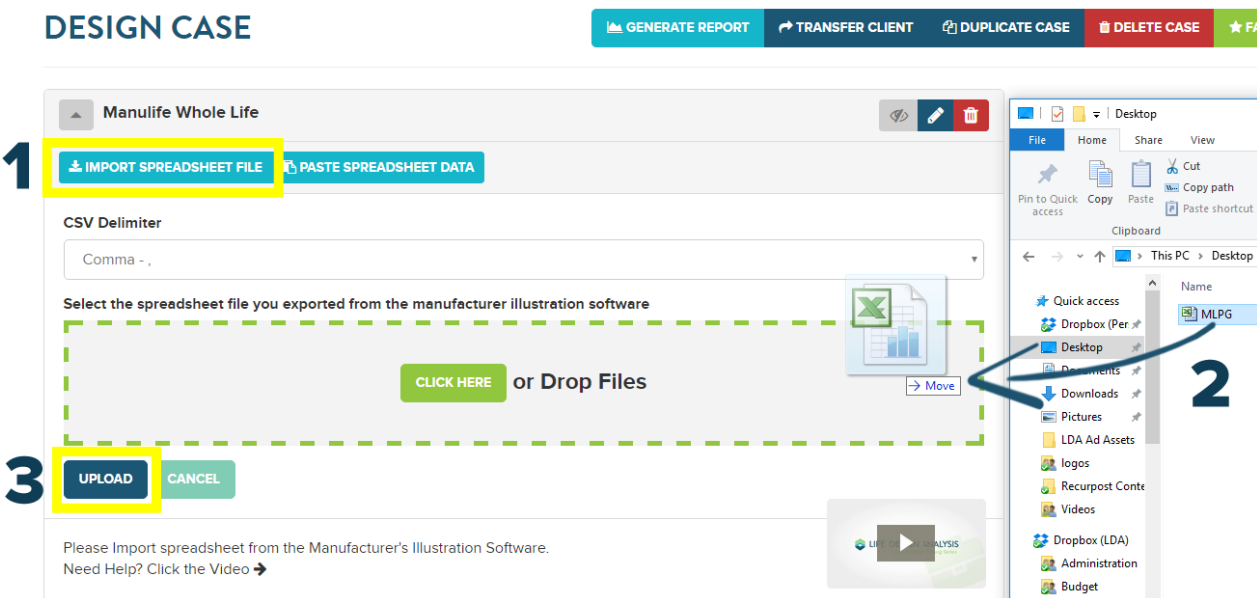
4. When the Spreadsheet opens in excel,  
 Choose **File**,  
**Save As**,  
**Select a location** (make it easy to find like your desktop).

Year   Age	Annual out of pocket premium primary example (\$)	Annual premium required (\$)	Guaranteed cash value (\$)	Dividend cash value primary example (\$)	Total cash value primary example (\$)	Guaranteed death benefit (\$)	Dividend death benefit value primary example (\$)	Total death benefit primary example (\$)	Annual premium for Simply Preferred term 20 rider	Total annual premium for optional benefits and riders (\$)	Adjusted cost basis primary example (\$)	Net cost of pure insurance primary example (\$)	Taxable gain on full policy surrender primary	Capital gain
1   51	36,505.00	36,505.00	0.00	753.29	753.29	1,500,000.00	2,177.14	1,502,177.14	1,620.00	1,620.00	35,228.15	1,276.85	0.00	1.4
2   52	36,505.00	36,505.00	0.00	2,084.63	2,084.63	1,500,000.00	5,839.31	1,505,839.31	1,620.00	1,620.00	69,920.54	1,812.61	0.00	1.4
3   53	36,505.00	36,505.00	0.00	4,267.42	4,267.42	1,500,000.00	11,596.25	1,511,596.25	1,620.00	1,620.00	104,182.45	2,243.09	0.00	1.4
4   54	36,505.00	36,505.00	0.00	7,452.59	7,452.59	1,500,000.00	19,612.09	1,519,612.09	1,620.00	1,620.00	137,985.99	2,701.46	0.00	1.3
5   55	36,505.00	36,505.00	0.00	11,761.49	11,761.49	1,500,000.00	30,080.54	1,530,080.54	1,620.00	1,620.00	171,290.22	3,200.77	0.00	1.3
6   56	36,505.00	36,505.00	6,620.00	17,326.62	23,946.62	1,500,000.00	42,994.09	1,542,994.09	1,620.00	1,620.00	204,055.94	3,739.28	0.00	1.3
7   57	36,505.00	36,505.00	18,300.00	24,214.29	42,514.29	1,500,000.00	58,347.69	1,558,347.69	1,620.00	1,620.00	236,205.11	4,355.83	0.00	1.3
8   58	36,505.00	36,505.00	31,380.00	32,551.28	63,931.28	1,500,000.00	76,232.51	1,576,232.51	1,620.00	1,620.00	267,676.27	5,033.84	0.00	1.3
9   59	36,505.00	36,505.00	47,430.00	42,467.03	89,897.03	1,500,000.00	96,515.97	1,596,515.97	1,620.00	1,620.00	298,371.70	5,809.57	0.00	1.2
10   60	36,505.00	36,505.00	66,590.00	54,964.35	121,554.35	1,500,000.00	121,334.11	1,621,334.11	1,620.00	1,620.00	328,204.09	6,672.61	0.00	1.2
11   61	36,505.00	36,505.00	89,050.00	70,150.46	159,200.46	1,500,000.00	150,537.46	1,650,537.46	1,620.00	1,620.00	357,045.21	7,663.88	0.00	1.2
12   62	36,505.00	36,505.00	117,360.00	89,459.78	206,819.78	1,500,000.00	184,675.95	1,684,675.95	1,620.00	1,620.00	384,744.92	8,805.29	0.00	1.2
13   63	36,505.00	36,505.00	152,520.00	108,700.57	261,220.57	1,500,000.00	220,936.12	1,720,936.12	1,620.00	1,620.00	411,156.63	10,093.29	0.00	1.3
14   64	36,505.00	36,505.00	189,750.00	131,176.48	320,926.48	1,500,000.00	259,242.05	1,759,242.05	1,620.00	1,620.00	436,106.62	11,555.02	0.00	1.3
15   65	36,505.00	36,505.00	234,000.00	155,758.33	389,758.33	1,500,000.00	299,535.25	1,799,535.25	1,620.00	1,620.00	459,384.39	13,227.23	0.00	1.3
16   66	36,505.00	36,505.00	280,350.00	182,520.98	462,870.98	1,500,000.00	341,799.59	1,841,799.59	1,620.00	1,620.00	480,780.37	15,109.02	0.00	1.3
17   67	36,505.00	36,505.00	334,280.00	211,457.99	545,737.99	1,500,000.00	385,872.24	1,885,872.24	1,620.00	1,620.00	500,631.32	16,654.05	45,106.67	1.3
18   68	36,505.00	36,505.00	394,100.00	243,076.41	637,176.41	1,500,000.00	431,752.06	1,931,752.06	1,620.00	1,620.00	518,779.50	18,356.82	118,396.91	1.4
19   69	36,505.00	36,505.00	456,620.00	277,116.85	733,736.85	1,500,000.00	479,440.91	1,979,440.91	1,620.00	1,620.00	535,070.63	20,213.87	198,666.21	1.4
20   70	36,505.00	36,505.00	528,660.00	314,152.45	842,812.45	1,500,000.00	528,876.17	2,028,876.17	1,620.00	1,620.00	549,400.50	22,175.14	293,411.95	1.4
21   71	0.00	0.00	554,190.00	353,660.78	907,850.78	1,000,000.00	580,723.78	1,580,723.78	0.00	0.00	536,580.75	12,819.75	371,270.03	1.0
22   72	0.00	0.00	568,750.00	395,668.66	964,418.66	1,000,000.00	633,069.86	1,633,069.86	0.00	0.00	522,332.10	14,248.65	442,086.56	1.1
23   73	0.00	0.00	585,180.00	440,362.90	1,025,562.90	1,000,000.00	685,954.67	1,685,954.67	0.00	0.00	506,530.59	15,801.51	519,032.31	1.1
24   74	0.00	0.00	600,750.00	486,636.94	1,087,386.94	1,000,000.00	739,569.82	1,739,569.82	0.00	0.00	489,059.45	17,471.13	598,327.48	1.2
25   75	0.00	0.00	616,370.00	535,146.64	1,151,516.64	1,000,000.00	793,986.12	1,793,986.12	0.00	0.00	469,800.07	19,259.40	681,716.58	1.3
26   76	0.00	0.00	632,960.00	586,866.72	1,219,826.72	1,000,000.00	849,300.61	1,849,300.61	0.00	0.00	448,634.46	21,165.60	771,192.26	1.4
27   77	0.00	0.00	649,590.00	641,227.70	1,290,817.70	1,000,000.00	905,688.84	1,905,688.84	0.00	0.00	425,438.70	23,195.76	865,379.00	1.4
28   78	0.00	0.00	665,360.00	697,479.83	1,362,839.83	1,000,000.00	963,369.94	1,963,369.94	0.00	0.00	400,102.05	25,336.65	962,737.78	1.5
29   79	0.00	0.00	681,170.00	756,682.82	1,437,852.82	1,000,000.00	1,022,544.35	2,022,544.35	0.00	0.00	372,506.02	27,596.04	1,065,346.80	1.6
30   80	0.00	0.00	697,030.00	819,057.93	1,516,087.93	1,000,000.00	1,083,409.95	2,083,409.95	0.00	0.00	342,504.32	29,965.70	1,173,547.60	1.7
31   81	0.00	0.00	712,940.00	884,827.01	1,597,767.01	1,000,000.00	1,146,148.98	2,146,148.98	0.00	0.00	310,096.17	32,444.15	1,287,670.84	1.8
32   82	0.00	0.00	727,980.00	953,073.92	1,681,053.92	1,000,000.00	1,211,021.50	2,211,021.50	0.00	0.00	275,067.93	35,028.25	1,405,986.00	1.9
33   83	0.00	0.00	743,050.00	1,025,121.10	1,768,171.10	1,000,000.00	1,278,205.87	2,278,205.87	0.00	0.00	237,354.47	37,713.46	1,530,816.64	2.0
34   84	0.00	0.00	757,250.00	1,099,894.19	1,857,144.19	1,000,000.00	1,347,909.54	2,347,909.54	0.00	0.00	196,862.80	40,491.66	1,660,281.39	2.1
35   85	0.00	0.00	770,560.00	1,177,454.89	1,948,014.89	1,000,000.00	1,420,331.59	2,420,331.59	0.00	0.00	153,501.52	43,361.28	1,794,513.37	2.2
36   86	0.00	0.00	783,900.00	1,259,263.47	2,043,163.47	1,000,000.00	1,495,562.31	2,495,562.31	0.00	0.00	107,181.56	46,319.96	1,935,901.91	2.3





5. Now in LDA you can click **Import spreadsheet file** we just saved and select the file we just saved or drag and drop it in the area.



Please contact [info@lifedesignanalysis.com](mailto:info@lifedesignanalysis.com) if you have any questions.