

LDA SUN LIFE SPREADSHEET IMPORT GUIDE

To compare a Sun Life Whole Life plan start by adding Sun Life 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 several insurance products, with 'Sun Life Whole Life' highlighted in yellow. 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'.

Benefit	Override	Age	Analyze Years	Internal Rate of Return of Cash Value Offset	Internal Rate of Return of Insurance Benefit Offset

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

DESIGN CASE

GENERATE REPORT

▲ Sun Life 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 Sun Life Quote in the illustration software (you can include term riders, ADO, Any dividend option)

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

Product Selector | New | Open | View report | Save | Save as

PLAN DESIGN | **SPREADSHEET** | STRATEGIES | REPORT DESIGN

Sun Par Protector II

Untitled illustration | Export to Excel | Show Illustration Summary

Columns to display: All columns view

Year	Age	Total guaranteed yearly premium	Total guaranteed annualized premium	Total guaranteed monthly premium	Total annualized premium (Current rate)	Total annualized premium (Current rate minus 1%)	Total annualized premium (Current rate minus 2%)	Guaranteed
1	51	\$38,305.00	\$38,305.00	\$3,447.45	\$38,305.00	\$38,305.00	\$38,305.00	
2	52	\$38,305.00	\$38,305.00	\$3,447.45	\$38,305.00	\$38,305.00	\$38,305.00	
3	53	\$38,305.00	\$38,305.00	\$3,447.45	\$38,305.00	\$38,305.00	\$38,305.00	
4	54	\$38,305.00	\$38,305.00	\$3,447.45	\$38,305.00	\$38,305.00	\$38,305.00	
5	55	\$38,305.00	\$38,305.00	\$3,447.45	\$38,305.00	\$38,305.00	\$38,305.00	\$1
6	56	\$38,305.00	\$38,305.00	\$3,447.45	\$38,305.00	\$38,305.00	\$38,305.00	\$11

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



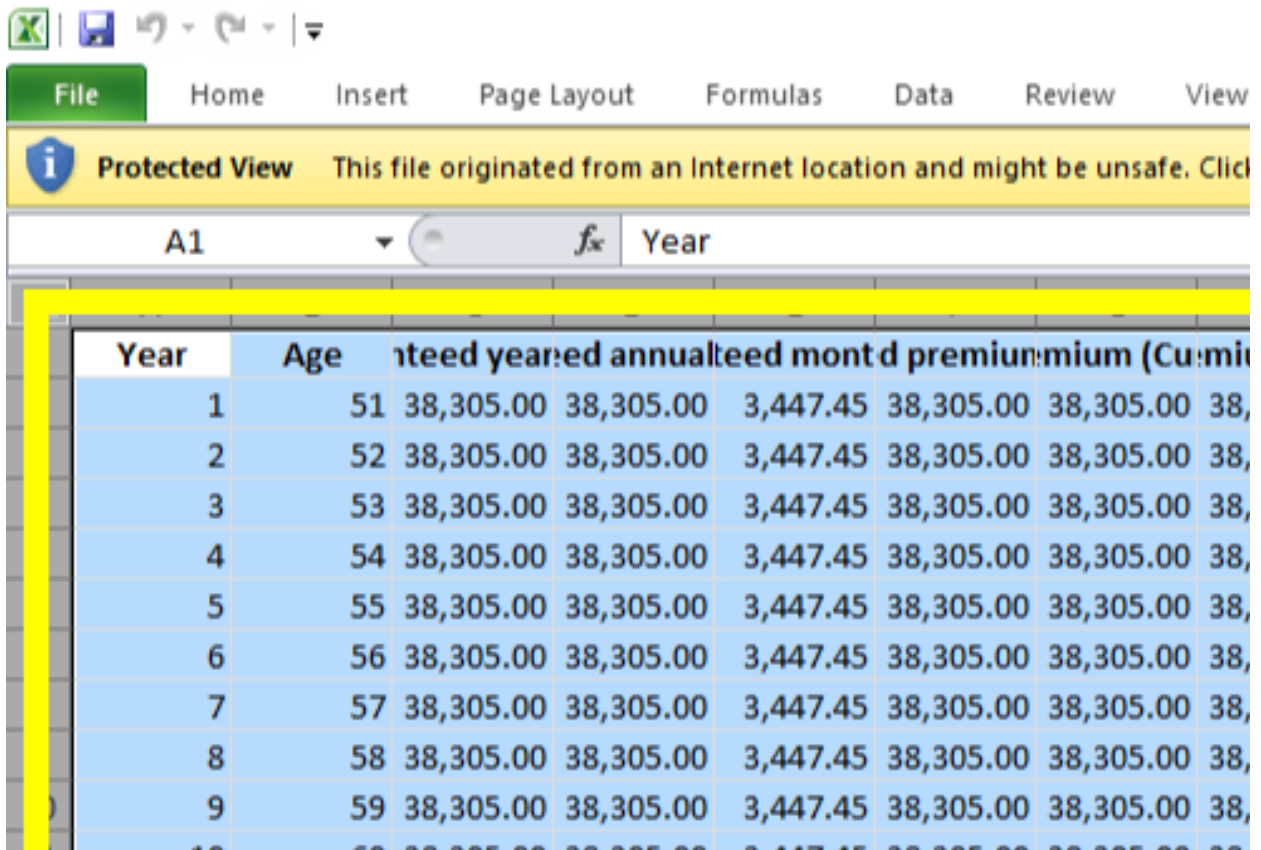
Show Illustrations

Columns to display: All columns view

ed	Total annualized premium (Current	Total annualized premium (Current
----	-----------------------------------	-----------------------------------

This will save your quote (usually your downloads folder).

3. Use **CTRL + A** to select all and then **CTRL + C** to copy.



1

2

3

UPLOAD CANCEL

Please Import spreadsheet from [redacted] software.
Need Help? Click the Video →

4. Now click the **Paste Spreadsheet Data** button and **right click and paste the data in the box** (it looks out of order but that is how it should look).

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