

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 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
- Sun Life Whole Life** (highlighted in yellow)
- 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 interface shows various input fields and labels such as '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

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

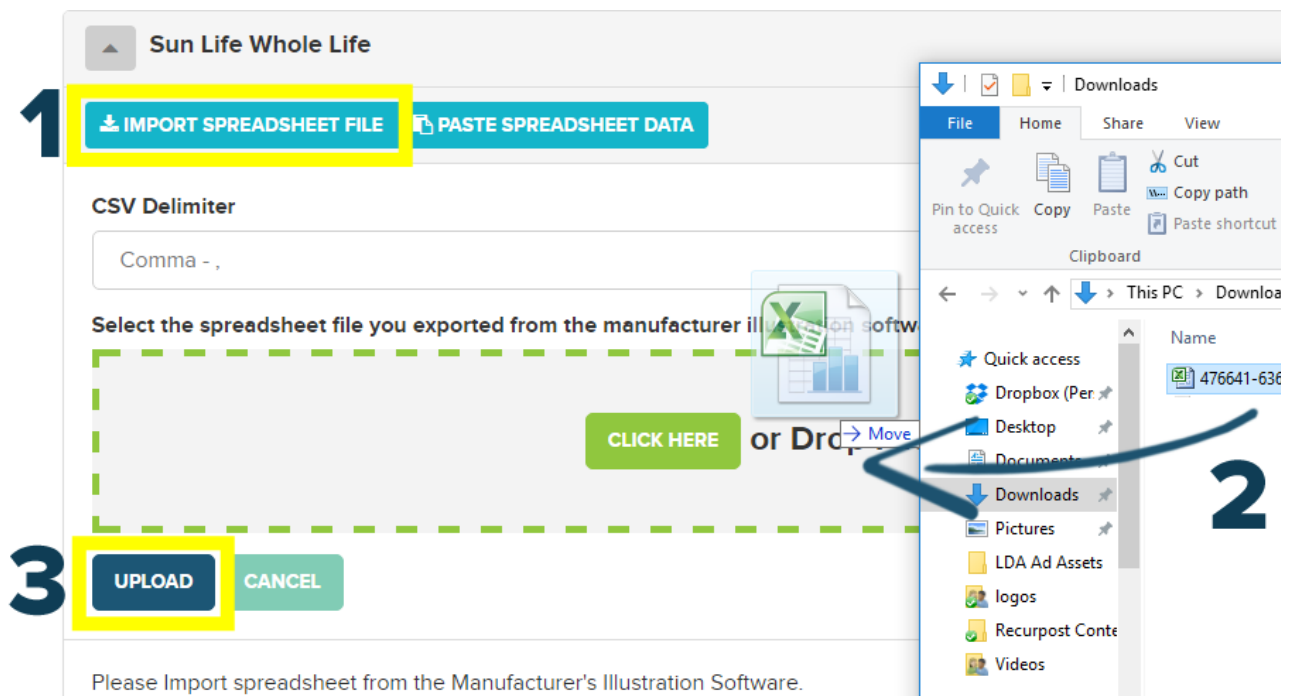
Year	Age	Total guaranteed yearly premium	Total guaranteed annualized premium	Total guaranteed monthly premium	Total annualized premium (Current rate)	Total annualized premium (Current rate minus 1%)	Total annualized premium (Current rate minus 2%)	Guaranteed
1	51	\$38,305.00	\$38,305.00	\$3,447.45	\$38,305.00	\$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**.



ed nt	Total annualized premium (Current	Total annualized premium (Current
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This will save your quote (usually your downloads folder).



3. Now you can go back to Ida and click **Import spreadsheet** and select or drag in the downloaded file.

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