

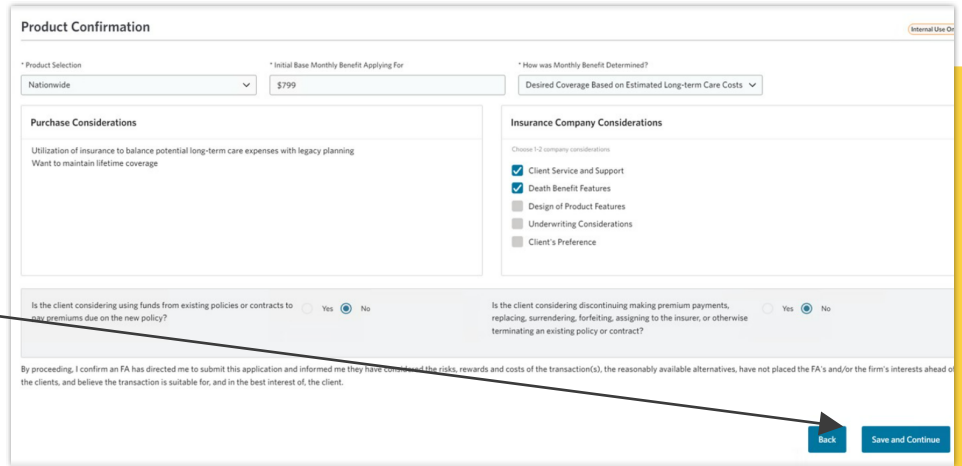
The “Platform” is designed to provide a seamless eApplication (eApp) experience for all parties assigned to a case. Now you will be able to easily complete the life insurance application through an easy-to-use interface, and track the case through policy delivery.

### Getting started:

Watch this [quick 10 min. video](#) to familiarize yourself with the Platform.

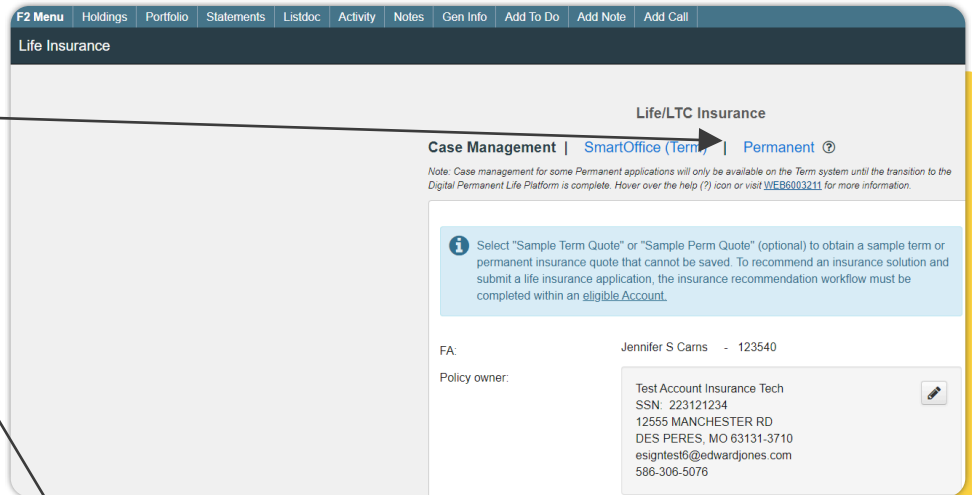
### Platform Access:

For new cases, you will automatically access the platform to start the application by selecting "Save and Continue" at the end of the Insurance Recommendation workflow.



### Case Access:

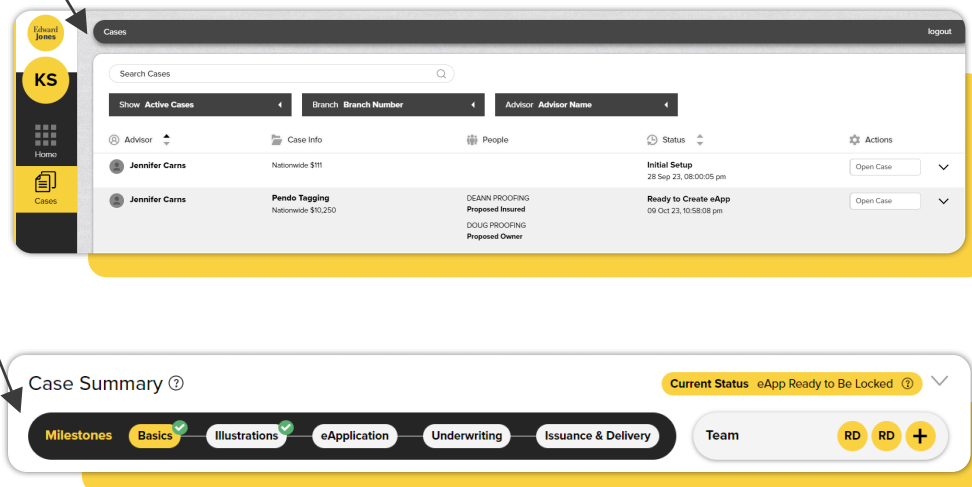
To access your cases that have been started in the Platform, select Permanent at the top of the Insurance Recommendation Workflow to access your Cases page within the Platform.



### Milestone Module:

The Milestone module allows Advisors, Branch Office Administrators and Distribution Partners to manage their cases throughout each phase of the eApp process.

Each Milestone houses different statuses and requirements that allows your team to track an eApp through to Delivery. The steps follow a sequential order, but you can also click on any milestone to view the current status instead of waiting for a "next" button to appear.



### Basics Milestone:

Changes to this information can only be made from your client’s Edward Jones account or by completing a new Recommendation Workflow.

You can sync changes from your client’s account by clicking on the button “Account Info Sync”.

### Illustrations Milestone:

You can upload illustrations received from your Distribution Partner, or order any additional illustrations from them, directly from this Milestone.

All illustrations shown to the client must be uploaded to ensure they are auto-retained to the client's account.

Once uploaded, you will need to select one as the "Official Illustration" by toggling the Official Illustration button in order to create an eApp. Then select "Create eApp" to proceed.

### eApplication (eApp):

You can easily track the progress of each application within the eApplication Milestone. The sections within the eApp are pre-filled using data from the Official Illustration.

You can also Invite your client to the platform to assist you in completing the eApp.

Each eApp section provides prompts throughout the process with red badges and progress bars. These will indicate which sections of the eApp are still incomplete.

### Multiple Insureds (eApp):

When you have multiple insureds on a case, the UI appears per insured. Here we are updating the information and details for Marcelle.

Clicking on the other insured button “Julio” will close Marcelle’s section and allow the user to update information for Julio.

### Subaccount Allocation (eApp):

When selling a Variable product that has Subaccount Allocations, a table will be located within “Policy Details” > “VUL Details”.

Available funds appear in the table by Investment Category, then Asset Class, Domestic or International and if they are on a Focus List.

Click on the Investment Category to open or collapse the category table.

On the far right, the user can indicate percentages for each fund in the “allocations” column. A “0%” allocation amount is implied until the user enters a percentage value.

As the user changes values for funds, the table updates automatically. The user is blocked from submitting the application until the Total Allocation amount equals 100%.

**VUL Details** Policy Dating Premium Financing Billing & Payor TIA Notifications & Authorization Producer's Certification Producer Report

Premium Allocations

Indicate percentage amount to be allocated into each of the investment options available. Please refer to your VUL product prospectus or offering memorandum for the current list of available investment options and to obtain more information about them. Due to the dynamic nature of fund offerings and fund management, please ensure your selections are consistent with the offerings listed in your current product prospectus.

Investment Category and Funds	Asset Class	Domestic / International	Focus List	Allocations
<b>Large Cap</b>				<b>0%</b>
Fidelity VIP Total Market Index	Large Blend	Domestic	No	%
Neuberger Berman AMT Sustainable Equity	Large Blend	Domestic	No	%
PSF Equity Index (BlackRock)	Large Blend	Domestic	Yes	%
Fidelity VIP Intl Index	Foreign Large Blend	International	No	%
<b>Small &amp; Mid Cap</b>				<b>0%</b>
<b>Multiple</b>				<b>0%</b>
<b>Income</b>				<b>0%</b>
<b>Agg Income</b>				<b>0%</b>
<b>Cash</b>				<b>0%</b>

**Net Premium Allocation Total**  
0%  
Total must equal 100%

Investment Category and Funds	Asset Class	Domestic / International	Focus List	Allocations
<b>Large Cap</b>				<b>100%</b>
Fidelity VIP Total Market Index	Large Blend	Domestic	No	% 25
Neuberger Berman AMT Sustainable Equity	Large Blend	Domestic	No	% 25
PSF Equity Index (BlackRock)	Large Blend	Domestic	Yes	% 25
Fidelity VIP Intl Index	Foreign Large Blend	International	No	% 25
<b>Small &amp; Mid Cap</b>				<b>0%</b>
<b>Multiple</b>				<b>0%</b>
<b>Income</b>				<b>0%</b>
<b>Agg Income</b>				<b>0%</b>
<b>Cash</b>				<b>0%</b>

**Net Premium Allocation Total**  
100%  
Total must equal 100%

### Underwriting Milestone:

Once the eApp is submitted and in Underwriting, you and your Distribution Partner will see any underwriting requirements within the Product Partner Underwriting module.

Once the underwriting decision is made, it will be displayed here.

Cases / Gerardo Deckow logout

Case Summary Current Status Submitted

Milestones Basics Illustrations eApplication **Underwriting** Issuance & Delivery

Team HJ HU VW +

Product Partner Underwriting

5:34 PM Monday, 21 Aug 23  
**Underwriting Requirements (1/1)**  
These terms came up in underwriting and require your attention:  
For questions on underwriting requirements, contact Crump.

Requirement 1  
21 Aug 23, 05:34 PM **Completed** See Details

5:33 PM Monday, 21 Aug 23  
**Under Review at Nationwide**  
Your case has been submitted to Nationwide for underwriting. Should any issue arise in this process you will be notified with further instructions.

Submission Details  
Amount Applied For: \$1,715,555.61  
Rating Applied For: Single Non-Tobacco

### Issuance and Delivery Milestone:

Within this milestone, you and your Distribution Partner can view any requirements needed for policy issuance within the Pending Issue Status Items section.

Once the policy is issued you will be notified within this module.

### Case Discussions:

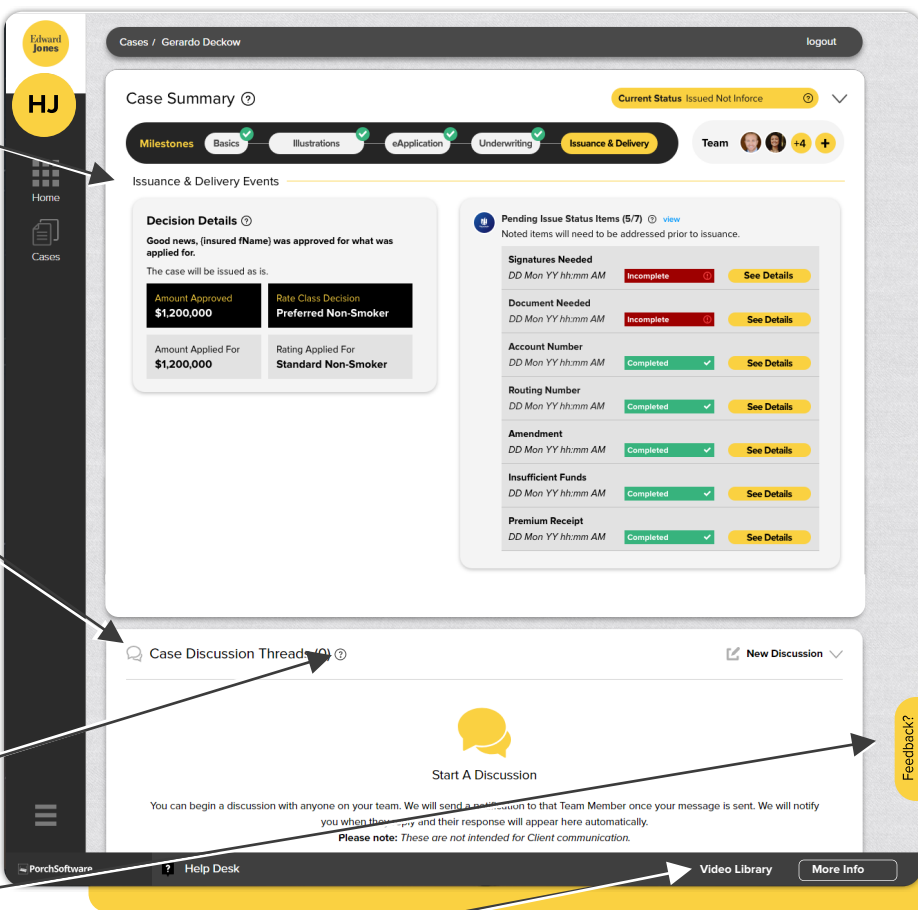
Use the Case Discussions module to communicate with your Distribution Partner or other members of your branch team.

### Resources & Feedback:

Throughout the Platform you will see Help tip icons that will provide you information on each given section.

Have feedback on the Platform? Click on the Feedback button on the right to send us your comments and suggestions.

Click on the Videos link below to access the video library for helpful tutorials and tips on how to operate the platform.



Additional details regarding the Platform (e.g., products available on the Platform, upcoming enhancements planned) can be found on the Edward Jones dedicated [JonesLink page](#) or WEB6003211. If you need assistance while using the Platform, please call the Insurance Service team at #92