

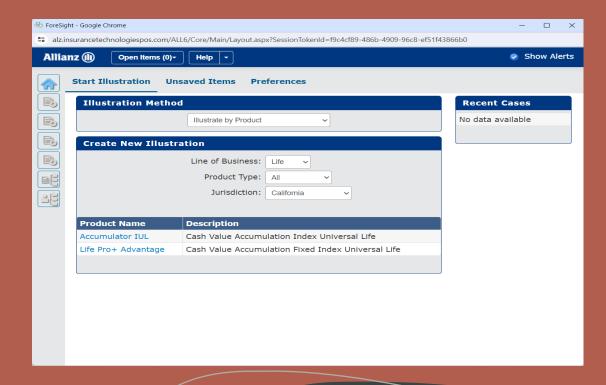
ALLIANZ LIFE



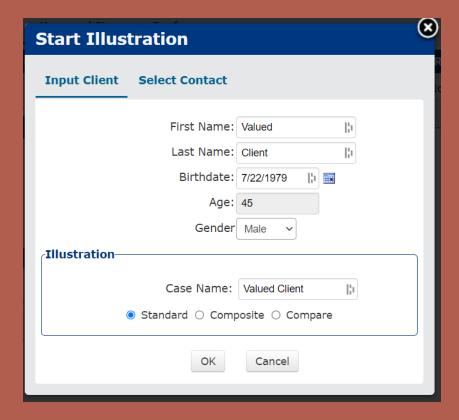
# 1. Login to Allianz life and on the main screen select New Business Illustrations - create new illustration



2.It will open another screen; you will select the state and the product. The product we always select is "Accumulator IUL



## 3. You put the name, gender and age of your client.





## 4 . Select "Standard Non-tobacco" where it says Risk classifcation

Client	Plan	Riders	Index Allocation Reports								
Illus	Illustration										
			State: California ~								
			Illustration Effective Date: 7/22/2024								
			Backdate to Save Age: ☐ <b>①</b>								
			Is this a premium finance case?: No v								
			Tax Bracket: 28.00%								
Insu	ıred Inf	ormation									
		Ins	ured								
			Client: Valued Client V Edit New								
			Issue Age: 24								
	Risk Information—										
			Risk Classification: Standard Nontobacco								
			Automatic risk-class upgrades for your eligible clients with our								
			Underwriting Risk-Class Upgrade Program. Learn more here.								
			Underwriting Guide								
			Table Rating: None >								

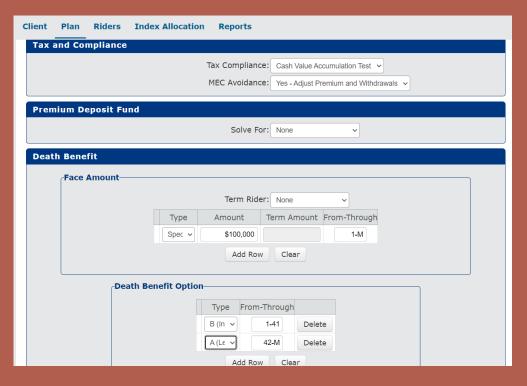


#### On Plan Tab

**5. Where it says Tax Compliance, select Cash Value Accumulation Text.** 

On Death Benefit you can select the amount desired by your client, if they don't have, we normally illustrate for 100K

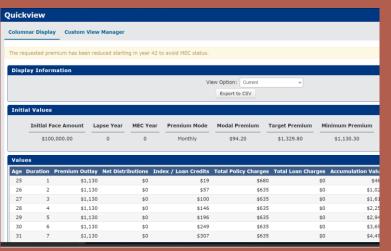
If the person is younger than 45 on death benefit option, we select type B (increasing and then add row, if older, just leave it as level.

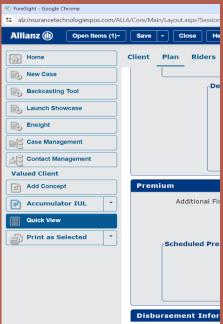


6. On premium, you go to scheduled premium, always select monthly unless you know client wants to pay different, and there you can illustrate by the Minimum premium or the Maximum they can pay monthly. If they have a certain amount they want to pay, you can leave the type as Specific amount and input the amount next to it. If the illustration is increasing always put 1-A65 on the From-Through

Client	Plan Riders	Index Allocati	ion Reports									
Premium												
Additional First Year Lump Sum (non-1035 funds): \$0.00												
		1035	035 Exchange Amount:		\$0.00							
		10	1035 Exchange Basis:		\$0.00							
	Scheduled Premium											
		Frequency 7	Type Amount		Adjustment	From-Through						
		Mont V S	pec <b>&gt;</b> \$5,0	00.00	\$0.00	1-A65						
	ursement Inforn	M Ti	Specify Amount Minimum Premium Target Premium Max Non MEC Premium Guideline Annual Premium Guideline Single Premium Cash Value Solve		ear							
Disbursements  The Sum of Fixed and Indexed Allocation must equal 100%.												
	Туре	Amount	Adjustment	Method	d Fixed	Indexe	d From-Throu					
	Non∈ ✓			Loan	/		4-M					
	Add Row Clear											
	Loan Interest Type: Capitalized  Frequency: Appual											

#### 7. You can look quick view by clicking on the tab in the left.







8. To download the illustration, you go to reports tab and click on Print Illustration as Selected. It is ready to send to client.

