AMERICAN NATIONAL®

QuickStart Guide

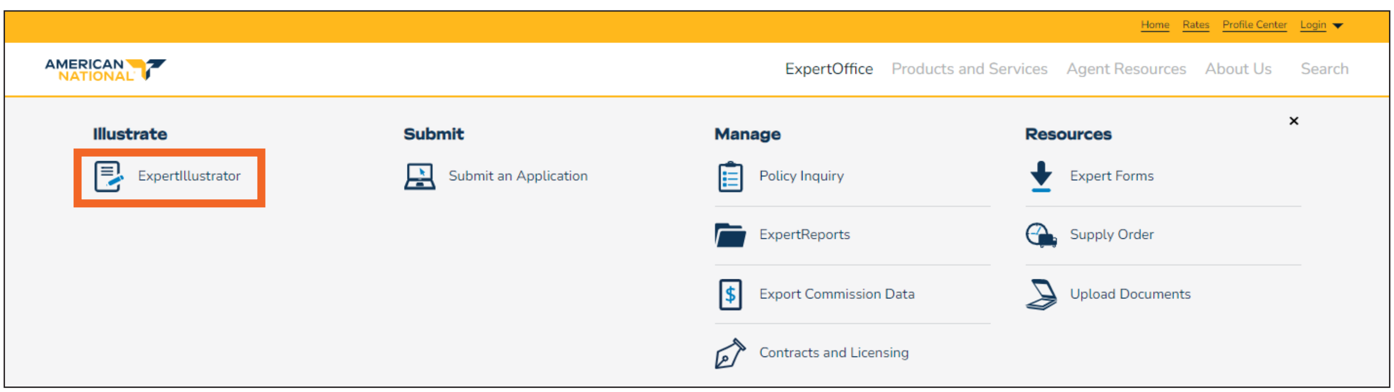
Illustrator Guide

Creating Life and Annuity Proposals

Helping your clients plan for the future has never been easier than with the updated ExpertIllustrator. Our software now encompasses all American National Life and Annuity products in one tool.

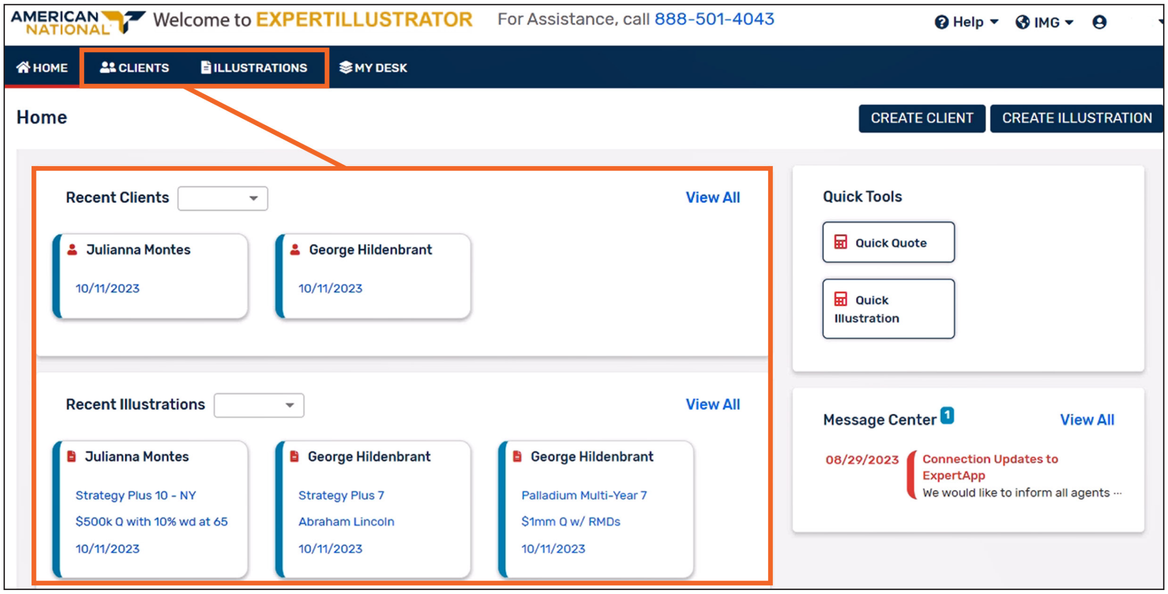
Accessing ExpertIllustrator from the LAD Website

Once logged into your portal (LAD.AmericanNational.com), you can select **ExpertIllustrator** within the ExpertOffice menu to access your dashboard.



The Dashboard

Your dashboard prominently displays **Recent Clients** and **Recent Illustrations** for easy access in case adjustments are needed. You may also search through your complete list of **Clients** or **Illustrations** via the links in the top-left navigation bar.



The right-side navigation includes:

- your **Account** information, where you may update the agent info to be displayed on the illustration.
- your **Illustration Entry** options.
- your **Quick Tools** for *life products*, expedites quotes without the need for full parameters.

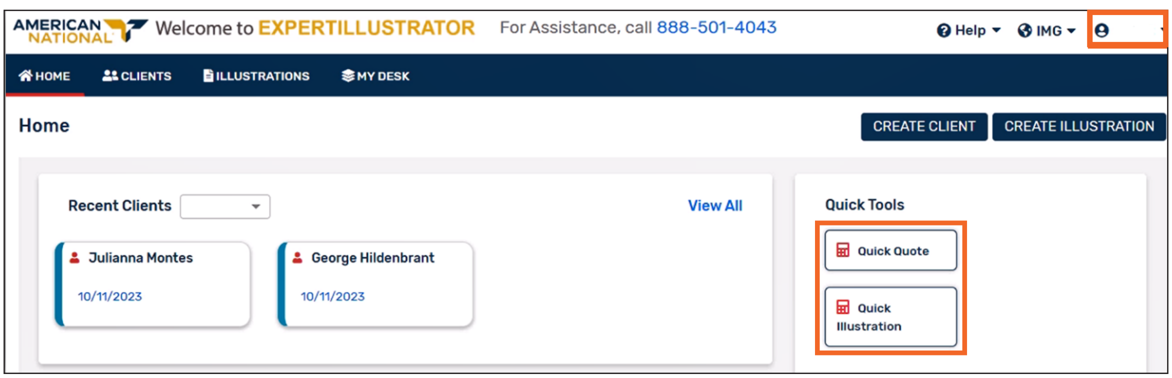
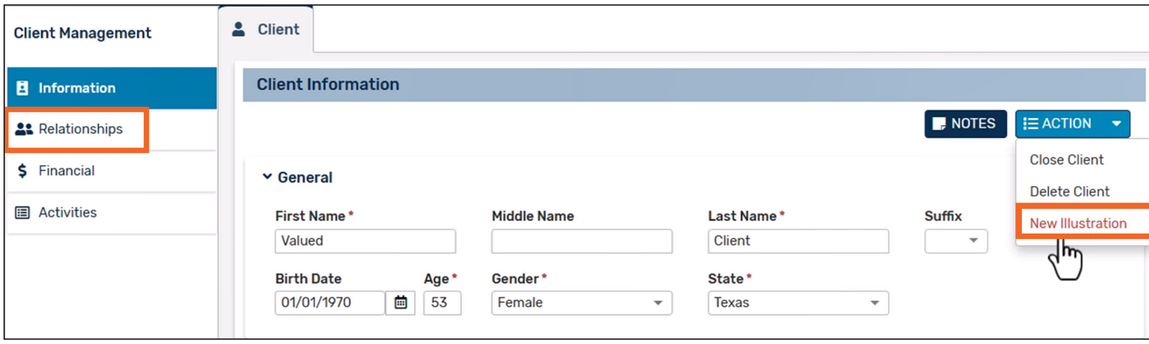


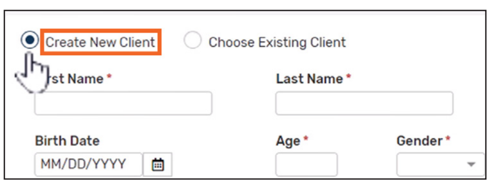
Illustration Entry Options

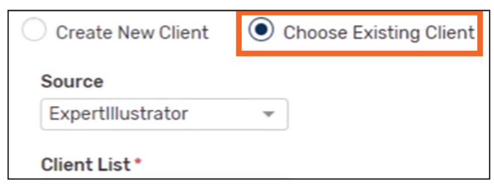
When beginning your proposal, note that for both entry options, fields with a **red asterisk (*) are required.**

Select **Create Client** to include **detailed client information** on the illustration output, as well as, to add **spousal or relationship information for joint ownership, riders, or payouts.** Once all client information is entered, you'll select **New Illustration** from the **Action** menu to move forward with selecting the type, product, and creating the illustration.



Select **Create Illustration** to **expedite** the process when there are no joint concerns. You'll be able to choose from your **existing client** list or enter a **new client** with abbreviated requirements. You'll only need the **Name, State, Age or DOB, and Gender** before selecting the product and creating the illustration.





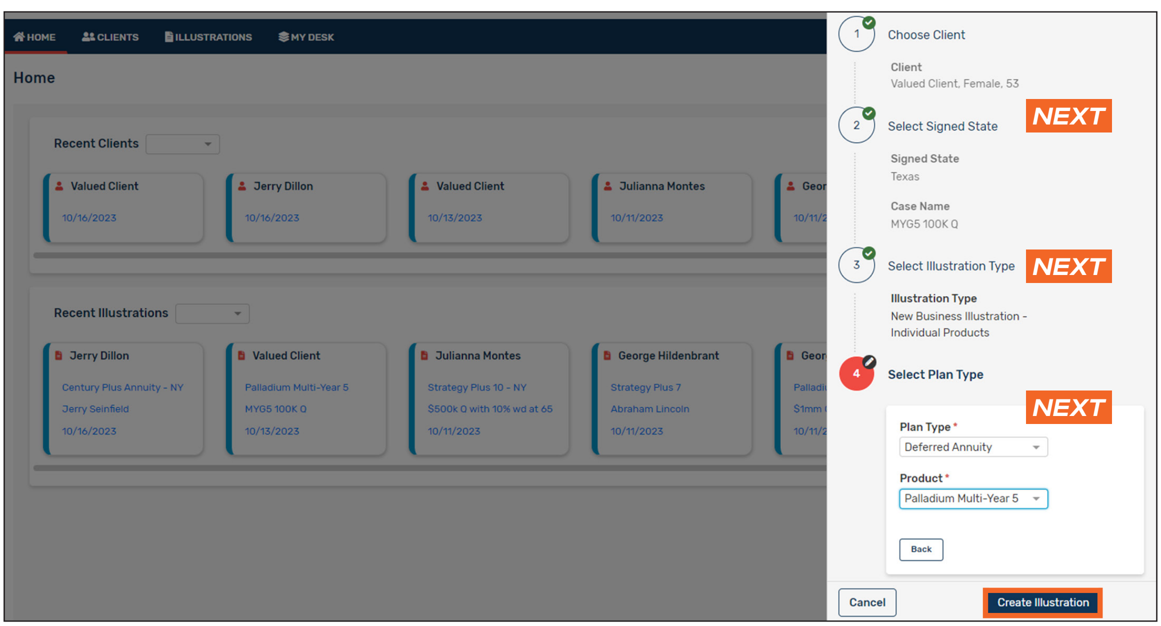
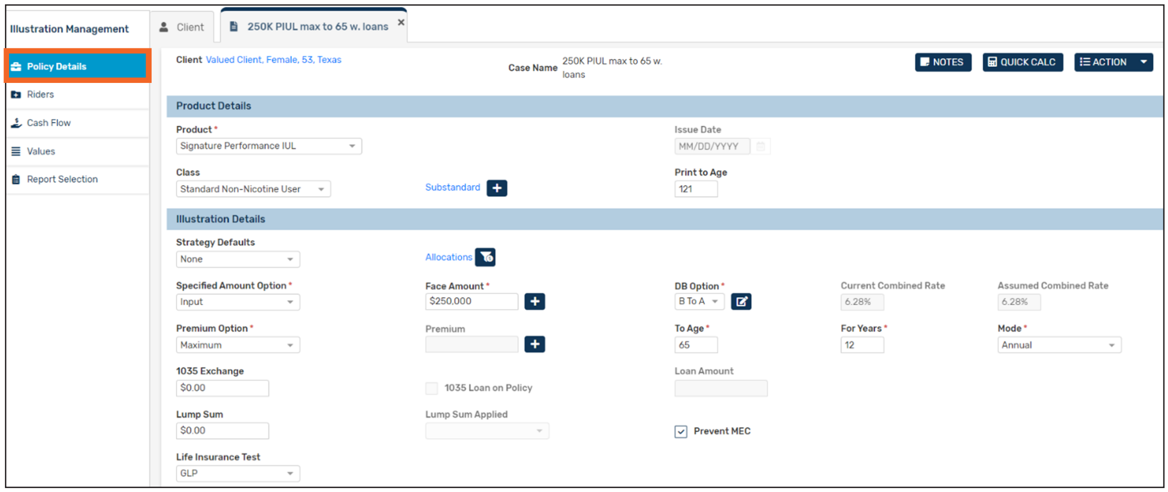


Illustration Management

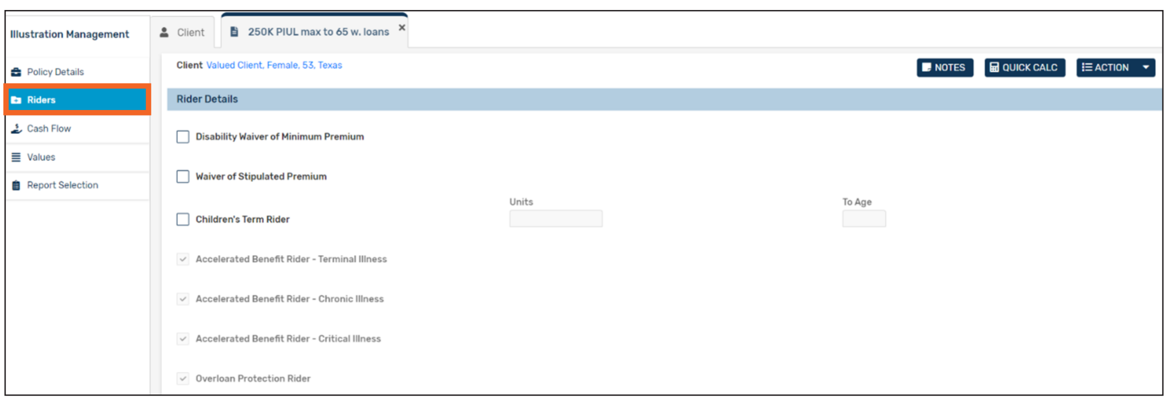
Policy Details

This screen enables the user to customize the illustration. A **red asterisk (*)** indicate fields required to run a successful illustration. Refer to illustration videos located at the bottom of each product page for product-specific structuring instructions



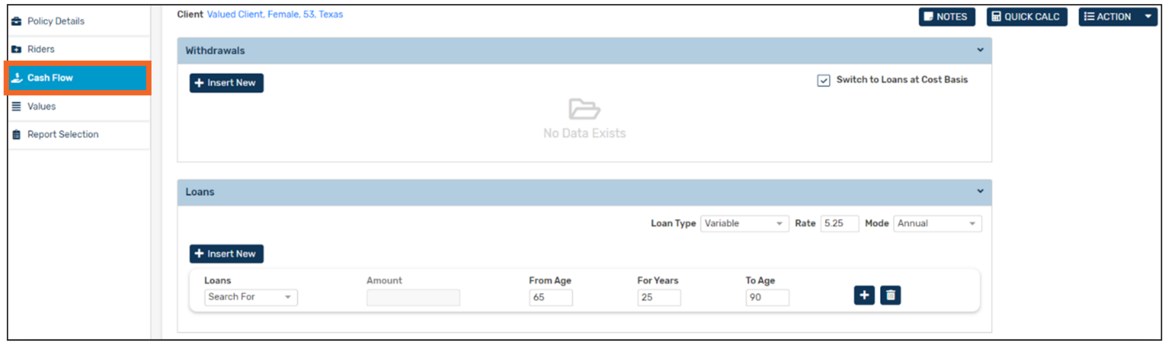
Riders

Select an available rider to add to the illustration (optional). If a rider selection is grayed out, it is either not available with the product or it is automatically included, which is indicated with a check mark.



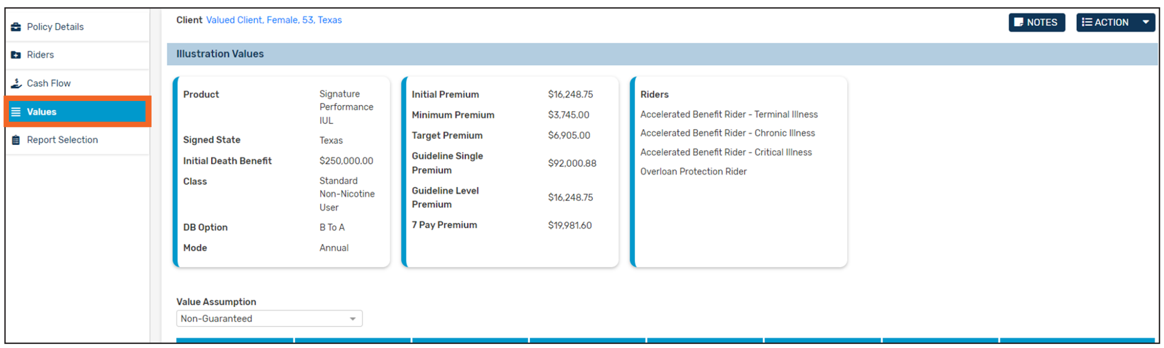
Cash Flow

Cash Flow gives the user the option to display withdrawals, hypothetical loans and repayment on the illustration. To add information to a section, select Insert New. A drop-down input field will appear and the user can select the + sign to add another line of cash flow.



Values

Values offers a quick snapshot of the values year-by-year for both guaranteed and non-guaranteed rates without running the full illustration.



Report Selection

Select optional reports, such as Company Financial History and Cash Flow, are available to add to the illustration.