

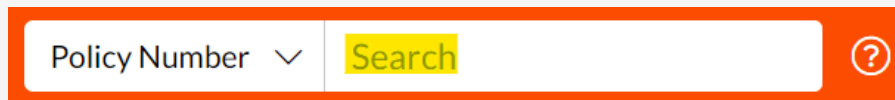
# What to Do Once You Receive a Statement or Illustration

Proformex streamlines the process of obtaining statements and illustrations from carriers annually. The request instructs the carrier to return the documents to your designated inbox. Read below on what to do next once you receive a document in your return email.

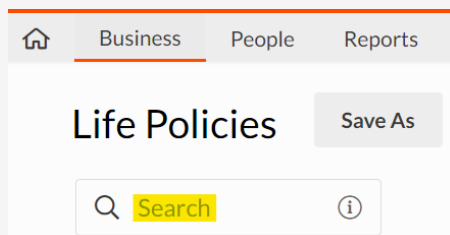
Please note, carriers may initially respond to a request with an acknowledgement email prior to fulfilling the request.

1. Navigate to that policy's Policy Details page

Find a policy via **Quick Search** in the top right corner



Or search within the **Business > Life Policies** page



- Click **Edit** to update policy values. Remember to **Save** your changes.

Life Policies / 2354900

Policy # 2354900

Activity Status ▾ Take Snapshot ⋮

Policy Information ▾

Details

Policy Details

Edit

- Navigate to the **Contacts** tab to **Add/Edit Owners, Agents, Insureds, Beneficiaries, Other Advisors**

Life Policies / 2354900

Policy # 2354900

Activity Status ▾ Take Snapshot ⋮

Policy Information ▾

Details

Contacts

Riders

Subaccounts

History

Documents

Notes

Tasks

Servicing ▾

Reviews

Owners

There's nothing here yet!

Add Owner to Policy

Agents

Add Agent to Policy

Bob Carter Primary Servicing Agent ▾

Insureds

Add Insured

Insured #1

Edit

4. If desired, navigate to the **History** tab to update **Year Over Year Tracking** and **Initial Values**. Remember to **Save** your changes.

**Policy Information** ▾

- Details
- Contacts
- Riders
- Subaccounts
- History**
- Documents
- Notes
- Tasks

**Servicing** ▾

- Reviews
- Guidelines
- Scheduled Document Requests

### Year Over Year Tracking

Search

Actions	Year	Death Benefit	Annualized Pre	Lapse Age	Cash Value	Surrender Value	Credit Rate
	2024	--	--	--	--	--	--
	2023	--	--	--	--	--	--

1 10 rows 1 - 2 of 2 entries

### Initial Values

Edit

Initial Death Benefit	--
Initial Annualized Premium	--
Initial Crediting Rate	--

**Note:** Year(s) will populate on the Year Over Year Tracking table based on the age / Issue Date of the policy.

5. Navigate to the **Documents** tab to **upload** the PDF

**Policy Information** ▾

- Details
- Contacts
- Riders
- Subaccounts
- History
- Documents**

### Documents

There's nothing here yet!

Upload Document



**Proformex Recommendation:** Now that you have up-to-date policy information, consider conducting a Policy Review. This creates an excellent opportunity to engage with your client, assess how the policy is performing, and ensure it continues to meet their needs.

Learn more about Policy Reviews [here](#).

For additional questions, please refer to our [Help Center](#) or reach out to your Customer Success Manager