



HOW TO USE STRATECISION FOR Hybrid LTCI Quotes

Step 1: Agent Information

- ▶ Enter your name (required). Other fields are optional.
- ▶ Click Next.

Step 2: Client Details

- ▶ Enter the client's name, date of birth or age, and state of residence.
- ▶ For couples: Select YES for "Joint Insured" and fill in the second insured's details.
- ▶ Click Next.

Step 3: Select a Policy

- ▶ Choose the carrier and policy you want to quote.
- ▶ Click Next.

Step 4: Customize Benefits

- ▶ Use drop-downs to select benefits and riders.
- ▶ You can also manually adjust dollar amounts by typing in the field.
- ▶ Click Calculate when done.

Tip: Hover over a benefit (e.g., "Monthly Benefit") and click for a detailed description and parameters.

Step 5: View Reports or Compare

- ▶ **Choose Illustration to run:**
 - ▶ Premium Calculation
 - ▶ Cost of Waiting
 - ▶ Break-Even Analysis
- ▶ **To compare quotes:**
 - ▶ Click Compare > Add Quote
 - ▶ Select another carrier and repeat steps
 - ▶ Compare up to 6 quotes (individual) or 3 quotes (couples).

Step 6: Print or Save

- ▶ After clicking Compare, select Print or Print to PDF.

PLEASE NOTE

OneAmerica: Use the OneAmerica | Care Solutions Calculator instead. Stratecision does not support joint policies or all product features for OneAmerica.

Nationwide CareMatters Together: Not supported in Stratecision.



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