KRAUSE AGENCY

HOW TO USE STRATECISION FOR

Traditional 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.

TIP

If unsure about a client's health, quote at Standard/Select rate. Carriers will automatically upgrade to Preferred if eligible, which makes policy delivery easier if the premium ends up being lower.

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