

Customizing your defaults

- Do you usually sell 20 YRT but the illustration defaults to 10 YRT?
- Do you sell PAC but the illustration defaults to Annual?
- Is your average face amount closer to \$200,000 than the \$100,000 default the illustration used?

If the answer to any of these questions is yes, and you're tired of constantly changing this information when you run an illustration, the solution is easy! Customize your illustration defaults. Just following these simple steps:

1. Change the information you want to customize.
2. Click on the Advisor Tools tab and select Save case as default.
3. Repeat for each product you sell.

Equitable Life Of Canada - R&C - NONAME

File Go To Report Advisor Tools Marketing Materials Help

Product: R&C Term Advisor: Special Quotes

Policy Owner: MTR: 50 % Province: Ontario

Client/Coverage Riders

Coverage Type: Single Life Number of Lives: 1 Premium Mode: Monthly PAC

Coverage 1 Add Delete

Plan Type: 20 YRCT

Face Amount: Specified \$ 200,000

Client Name	Sex	DOB (dd/mm/yyyy)	Age	Life Classification	Rating
Life_1	Male	__/__/__	35	Non-Smoker	<input type="checkbox"/>

Scenario 1 [scenario 2] [scenario 3] [scenario 4] [scenario 5]