

TIPS & TRICKS: INFORCE ILLUSTRATIONS ON WINFLEX WEB



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We are excited to not only better assist you in servicing your clients, but to also help you maximize the sustainability of your inforce book of business. This guide will help you run your own inforce illustrations in real-time on [WinFlex Web](#). For additional assistance with this process, please also see our recorded webinar, [Inforce Illustration Capability](#).

Before beginning an Inforce Illustration on WinFlex Web you should verify that your desired product is currently available on the system. To do so, please check our [Self-Service Inforce Illustrations](#) flyer which includes an updated list of available products.

Keep In Mind

Inforce illustrations of any kind are not available for any product until *after* the 1st policy anniversary date.

Inforce illustrations cannot be requested if a policy is in Grace or Lapse status.

This guide is divided into sections for your convenience. Please browse or skip directly to your desired topic as needed.

Section 1: Trouble finding the inforce policy on WinFlex Web, or finding the correct info from Connex to do so (i.e. Agent Code or Number).

Section 2: Need guidance on inforce illustration WinFlex Web process.

Section 3: Technical issues.

Section 4: Able to locate the policy and run the illustration, but have questions about policy details and/or potential modifications for a client.

Section 5: Need to run an illustration for a product not available in WinFlex Web.

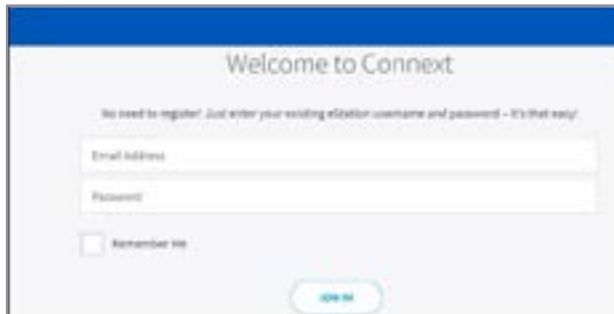
SECTION 1

Need to locate the correct Agent Code in order to run an inforce illustration – begin with *Step 1*.

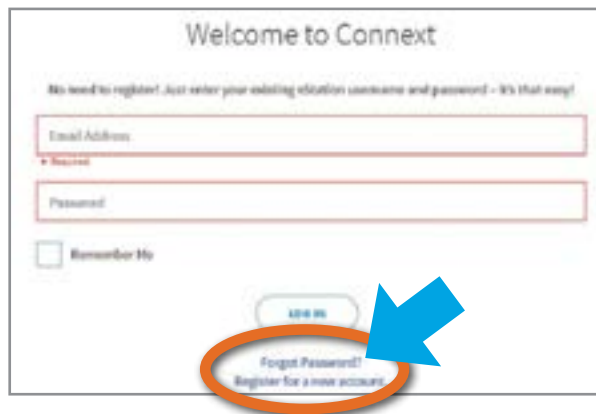
Already have the correct Agent Code and want to look up inforce policy details – skip to *Step 4*.

Follow the steps to find the correct agent number/ID through Connex.

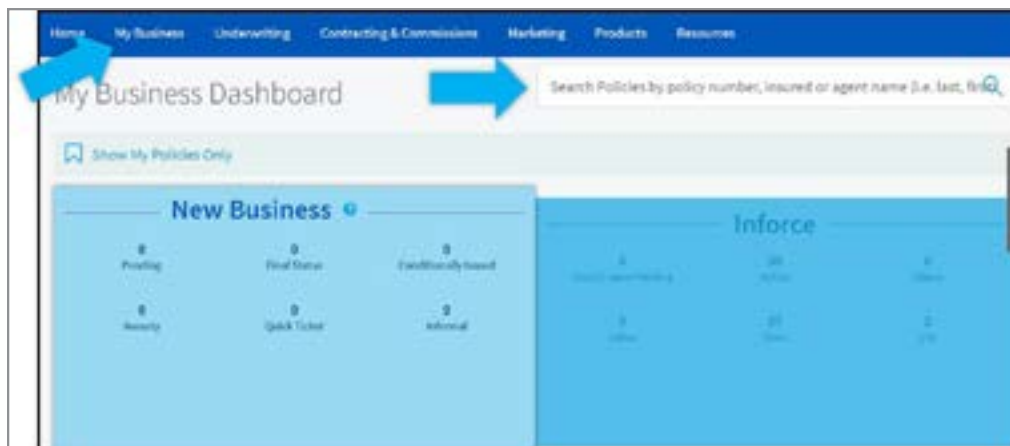
1. Since you have already registered for Connex, please **LOGIN**.



- If you do not remember your password, please follow the link on the login page to **“Forgot Password.”**



2. Once inside Connex, select **“My Business”** from the top horizontal menu. Then enter the policy number or insured name in the Search box, then search.



3. You will now be in the policy's Detailed Policy Information (below).
 - Click Agent List under the Detailed Policy Information section.
 - The Agent ID number will be located under "Agent" on the left-hand side.

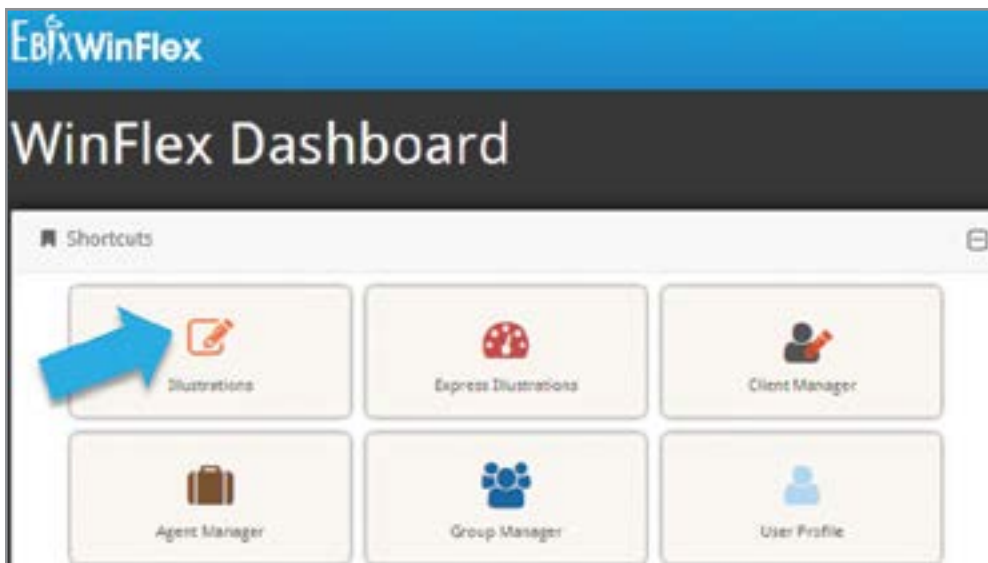


4. Confident you chose the correct Agent ID number or Policy Number to search, but still unable to locate the inforce policy? Contact your agency at the time of sale for further assistance.
 - If agency contact is no longer or currently unavailable, then contact Connex assistance by calling: **800.631.5777, Option 3.**

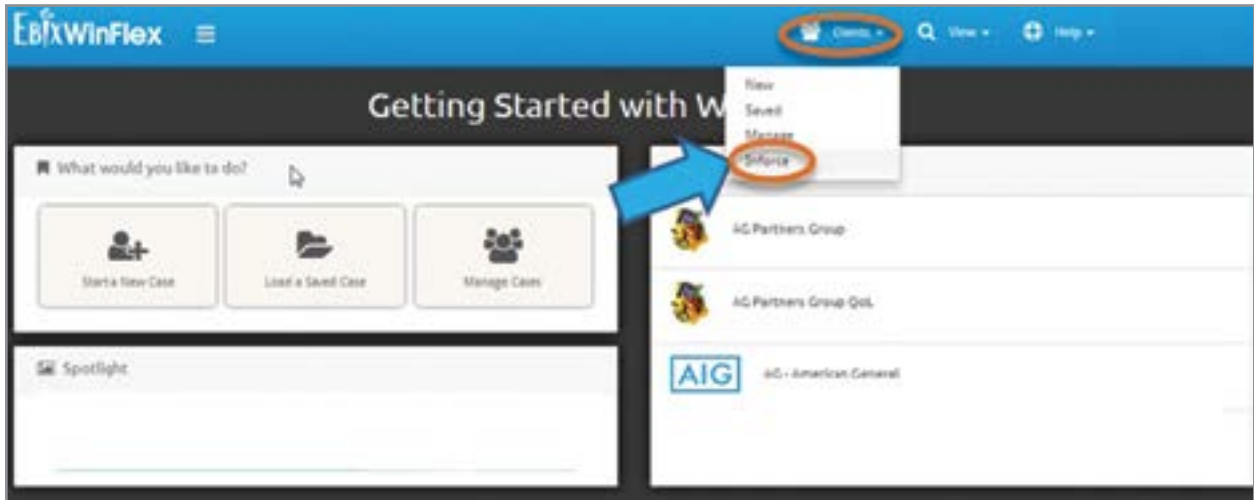
SECTION 2

Running an Inforce Illustration on WinFlex Web

1. To access WinFlex Web, visit the online [portal](#) and login with your current username and password.
Or copy and paste this address into your browser: <https://sixfive.winflexweb.com/>
2. Once logged in, click the Illustrations button.



3. Now move your cursor over the “Clients” drop down menu at the top of screen and select “Inforce.”



4. A screen will appear asking you to “Enter the Policy Number” and “Agent ID”.
 - a. **Note:** The Agent ID entered must be the agent of record for the corresponding policy number. The Policy Number and corresponding Agent ID are required to run an inforce illustration. If you encounter issues with this step, please return to “Section 1” of this guide for assistance .
5. Once that info has been entered, simply click the “Submit” button and WinFlex will allow you to begin running the inforce illustration.

A screenshot of a dialog box titled 'Download Inforce'. The dialog box has a dark header with a close button (X) on the right. Below the header, there are three input fields: 'Select the Company' with a dropdown menu showing 'AG - Inforce', 'Enter the Policy Number' with a text input field containing 'Policy Number', and 'Agent ID' with a text input field containing 'Agent ID'. At the bottom right of the dialog box, there are two buttons: 'Cancel' and 'Submit'.

6. For assistance with running a WinFlex Web illustration, please visit the [WinFlex page](#) in Connex.

Section 3

Issues with WinFlex Web or Connex

Support options:

- For **Connex** assistance in finding the correct **Agent Code/Producer Number** to correspond with the inforce policy, please call: **800.631.5777, Option 3**
- For **WinFlex** technical support call: **877.330.1193**

Section 4

Questions about policy details and/or potential modifications for my client.

- Resources available 24/7:
 - Flyer: [Requesting an Inforce Policy Change](#)
 - Flyer: [Help Your Clients Help Themselves With eService](#)
 - AIG Producer Portal (Connex) [Inforce Support page](#)
- AIG Life Insurance **Customer Service Support: 800.888.2452**
- For **UL-related product questions**
 - AIG American General & US Life Insurance Sales Desk: 800.677.3311, Option 2 for Agent, Option 3 for BGA or IMO
 - AIG Partners Group Life Insurance (QoL) Sales Desk: 800.358.5753

Section 5

Alternative ways to request Inforce Illustrations

1. To request an Inforce Illustration on a product not currently available in WinFlex Web, please complete the following:
 - [Inforce Illustration Request Form](#) (UL, VUL only) AGLC103760
 - Follow the instructions in the Inforce Illustration Request Form, and send the completed document to the fax number on the form.
2. Inforce Illustration requests can also be made by phone at: **800.247.8837**.

Please note the two request options above are not issued in real-time, and may require extended turn-around time to complete.



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