

First Time Instructions for Web-based Illustrations & Insmark



- 1.) Make sure you have downloaded the actual Insmark software on your computer from <u>www.NorthAmericanCompany.com</u> which can be found on the Illustrations tab.
- 2.) Then, when using Web-based Illustrations input everything needed to run your illustration in the "Policy" and "Rider" pages of the Quotes/Illustration tab.
- 3.) In the "Output Options" section of the Quotes/Illustration Tab, click on the "InsMark" button at the bottom.

		My Cases Welcome North American Company -
Test, Test North American Company for Life and Bui Health Insurance®	ider IUL8	Case Notes Save Case Actions
	Case Information Quotes/ Illustrations	Application
ADDITIONAL OPTIONS		View Illustration
Concept		
Illustration •	View Agent Only Illustration	
State		
Mississippi •	Optional Reports Listed Below	
Product Type		
Indexed Universal Life	🔲 Input Summary	
Product		
Builder IUL8 *	Revised Illustration	
ILLUSTRATIONS		
✓ Policy	Changing Needs Report	
Riders		
Output Options	Annual Deductions and Earnings Report	
	Taxable Gain Report	
	Internal Rate of Return Report	
	Underwriting Requirements	
	InsMark	
	< Back	

4.) When the following pop-up box appears, click the "Launch InsMark" button. (Hint: Make sure your pop-up blockers are turned off)

InsMark	×
Click Launch InsMark if you have a current, authorized copy of InsMark on your local computer. Otherwise, click Cancel.	
Launch InsMark	
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5.) Firefox will then open a download box at the bottom of your screen where you can select "Open with InsMark.ButtonFile (default) and check the "**Do this automatically for files like this from now on**" open file of this type with Insmark" if you don't want to have to do this in the future.

@1B59336B1	55A27BBD5B20170302111428750_Button.MIN.!Bl
which is: InsN	1ark ButtonFile (3.2 KB)
from: https://	igoforms-test.ipipeline.com
What should Firefo	x do with this file?
Open with	InsMark.ButtonFile (default)
Save File	
Do this <u>a</u> uto	omatically for files like this from now on.
	OK Cancel

6.) The next screen to populate should be Insmark as shown below. Click on the Insmark icon

		InsMark
Store life	insur	ance data for: Brandi 17-4 Test
$\overline{\}$	Sourc	e data notation:
This source	data is	linked to the InsMark Systems indicated below.
	IIS	InsMark Illustration System 17.1
da.	WAW	Wealthy and Wise
da.	LCS	Leveraged Compensation System
da.	LBSC	Loan-Based Split Dollar System
di.	PFS	Premium Financing System
di.	LP	Life Plan System
	DOD	Documents On A Disk
	((p))	Live Update
		Done