

Agent Guide to the Retirement Services Web Pages



Lafayette Life
Insurance Company

A member of Western & Southern Financial Group

DESIGN

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Agent Guide to the
**Retirement Services
Web Pages**

Table of Contents

- How do I access the Retirement Services web pages?.....3

Accessing your Block of Business

- How do I search for a Plan?.....4
- How do I access general Plan information?4

Plan Details

- What information is available on the new Retirement Services web pages?...5
 - Basic Plan Information5
 - Policy Values and the PIR.....5
 - Schedule A Information6
 - PS-58 Costs7
 - Contact Information.....7

Lafayette Life Retirement Services

The Retirement Services team at The Lafayette Life Insurance Company has over 30 years of experience in helping small businesses establish company-sponsored retirement plans for both its owners and employees. The Retirement Services web pages allow our agents access to full scope Retirement Services business information quickly and conveniently. The Retirement Services web pages provide many options to view general information regarding Retirement Plans, access Marketing Materials and more.

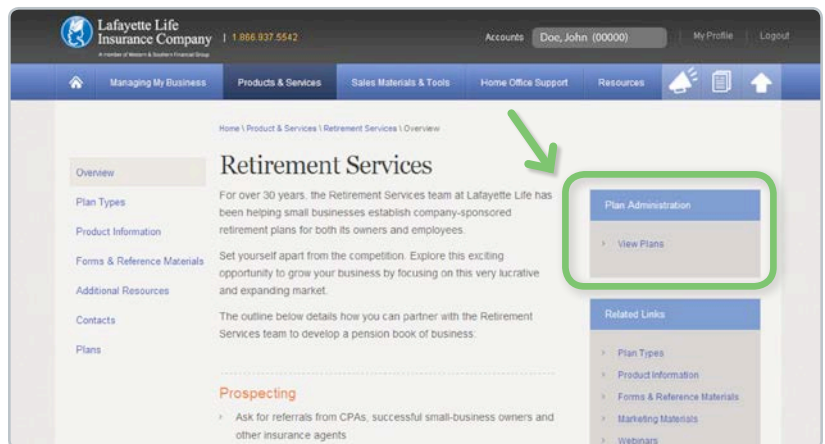
Let Lafayette Life help you take advantage of this exciting opportunity to grow your business through the lucrative and expanding Retirement Services market. Follow these simple steps to learn how you can get started with this exciting new tool.



Agent Home

How do I access the Retirement Services web pages?

- Log on to the Lafayette Life Agent's Website, and click on the **Retirement Services** icon.
- To view information on your block of Retirement Services business, select **View Plans** on the right side of the screen under **Plan Administration**.



Retirement Services Home: **View Plans**

Accessing your Block of Business

How do I search for a Plan?

- After selecting View Plans, the **Search Plans** page will appear. Use the search bar at the top of the page to locate a plan by plan name or number.
- The table below holds all plans currently in your block of business.
- You can sort a column by clicking on the column header. To access a particular plan, click on the plan number.

Plan Number	Plan Name	Plan Type	Status	Administrator	Agent	PYE	Past Due
1AWC0123	GENERAL PROFIT SHARING PLAN & TRUST	401(k) Safe Harbor	No Admin	Jane Doe ext. 4900	VALUED PRODUCER	12/31	No
1AWC1234	ABC PROFIT SHARING PLAN & TRUST	Profit Sharing	No Admin	Jane Doe ext. 4900	VALUED PRODUCER	12/31	Yes
1AWC2345	SIMPLE INC. PROFIT SHARING PLAN & TRUST	401(k)	Terminated	Jane Doe ext. 4900	VALUED PRODUCER	12/31	No

Search Plans

How do I access general Plan information?

- When a plan is selected, **Plan Detail** will appear. Plan Detail will contain:
 - Plan Name
 - Plan Number
 - Plan Year End
 - LLIC Administrator name and extension
 - List Bill associated with the Policies in the Plan

Plan Name	GENERAL PROFIT SHARING PLAN & TRUST
Plan Number	1AWC0123
Plan Year End	12/31
Administrator	Jane Doe ext. 4900
List Bill	C1234

Plan Detail

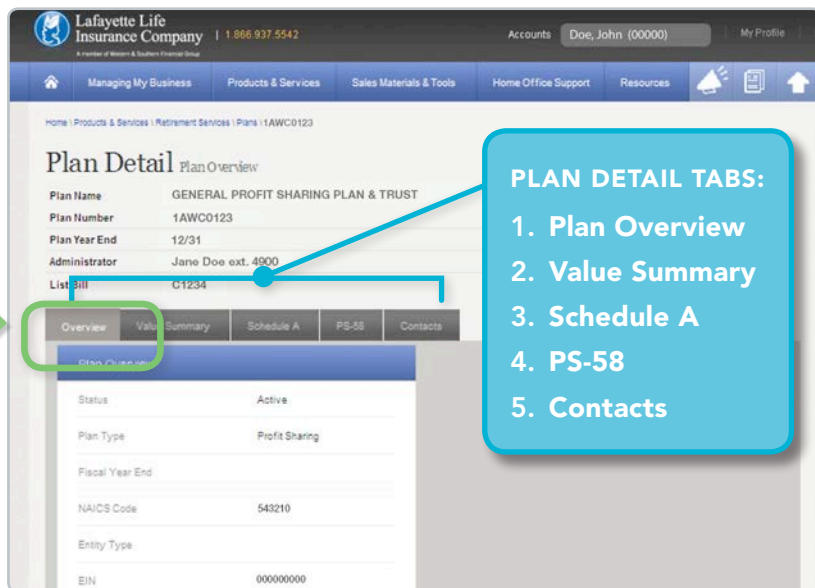
Plan Details

What information is available on the new Retirement Services web pages?

- Under Plan Detail, there are five tabs available:
Overview, Value Summary, Schedule A, PS-58 and Contacts

1 Basic Plan Information

- The **Plan Overview** tab provides information on the plan type, the service status and other basic information.



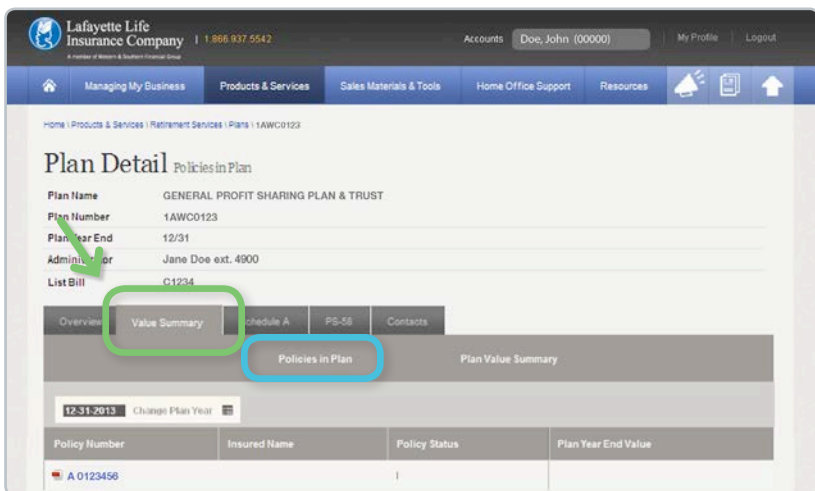
1. Plan Overview tab

2 Policy Values and the Policy Information Report (PIR)

- The **Value Summary** tab allows you to view policy values as of a plan year end, and review any transactions that have occurred in recent history.
- Clicking on the policy number will allow you to view a **Policy Information Report (PIR)** for the policy.

There are two sub-tabs in this section: Policies in Plan and Plan Value Summary.

- **Policies in Plan** shows all policies within a selected plan and is the default tab.



2. Value Summary tab | Sub-tab: Policies in Plan

Policy Values and PIR (continued)

- **Plan Value Summary** shows all transactions that occurred within a specified time frame.

The date range is limited to two years prior to the current day.

The screenshot shows the 'Plan Detail' page for 'GENERAL PROFIT SHARING PLAN & TRUST'. The 'Plan Value Summary' sub-tab is selected and highlighted with a blue circle. A green arrow points to the 'Plan Value Summary' sub-tab. The 'Value Summary' tab is also highlighted with a green circle. The page displays plan information, a date range selector (Start Date: 01/01/2011, End Date: 12/31/2013), and a table of Grand Totals.

Grand Totals	Total Prem.	Cash / Check	Div Applied	Over / Short	Withdrawal	Policy Fee
Grand Totals	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

2. Value Summary tab | Sub-tab: Plan Value Summary

3 Schedule A Information

- The **Schedule A** tab allows you to view Schedule A values based on dates selected.

The date range is limited to two years prior to the current day.

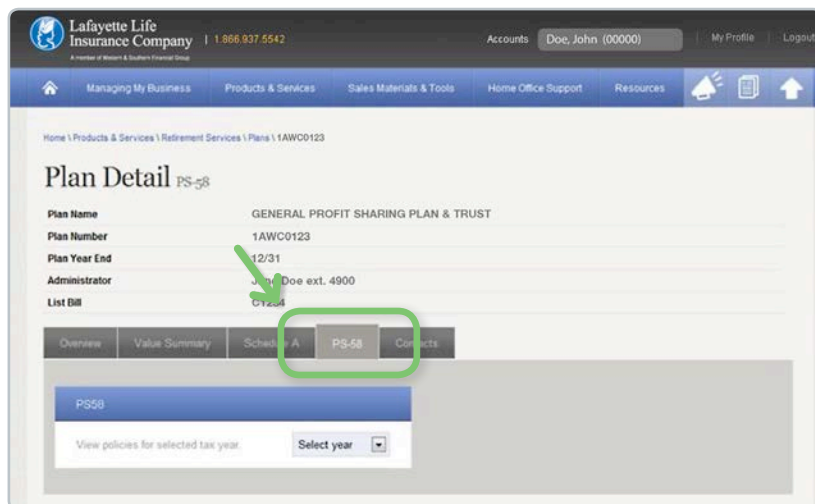
The screenshot shows the 'Plan Detail' page for 'GENERAL PROFIT SHARING PLAN & TRUST'. The 'Schedule A' sub-tab is selected and highlighted with a green circle. A green arrow points to the 'Schedule A' sub-tab. The page displays plan information, a date range selector (Start Date: 1/1/2013, End Date: 12/31/2013), and a table of Schedule A values.

Contracts With Allocated Funds	Annuity	Premium	Basis For Premium Rates
Contracts With Unallocated Funds			Balance at the end of previous year: \$0.00
Additions			
Contributions deposited during year			\$0.00
Interest credited during year			\$0.00
Total Additions			\$0.00
Total of Balance and Additions			\$0.00
Deductions			
Surrenders			\$0.00
Administration charges made by carrier			\$0.00
Total Deductions			\$0.00
Balance at the end of current year			\$0.00

3. Schedule A tab

4 PS-58 Costs

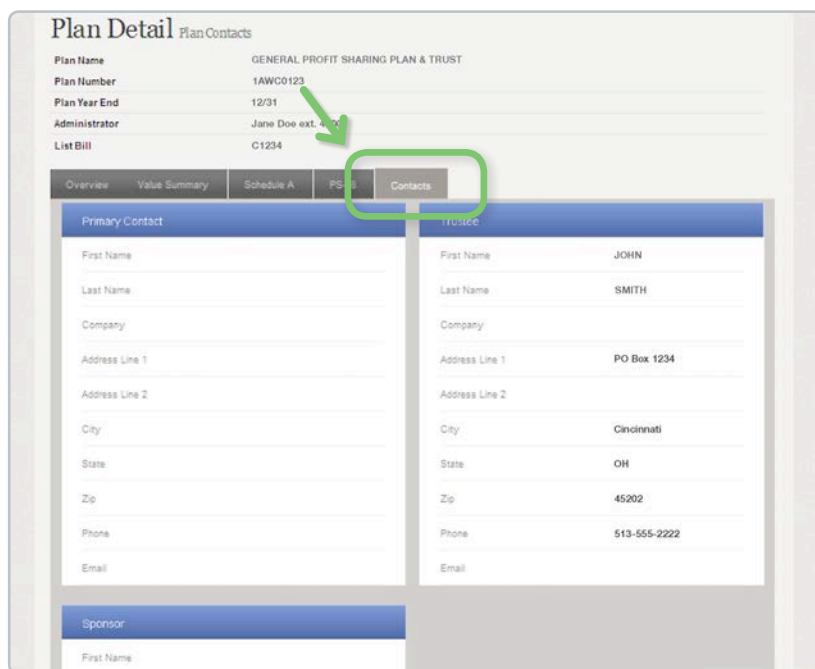
- To view the PS-58 costs for all policies in a plan, click the **PS-58** tab and select the tax year from the drop down menu.



4. PS-58 tab

5 Contact Information

- Contact information for the Primary Contact, the Trustee, the Sponsor, the Agent and the Regional can be located under the **Contacts** tab.



5. Contacts tab

If you have any questions regarding the Lafayette Life Retirement Services website, please do not hesitate to contact us at 1-800-555-6048.

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The Lafayette Life Insurance Company, Cincinnati, OH, operates in D.C. and all states except New York.

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