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0152793-00003-00 Ed. 04/2010 Exp. 10/2011



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QUICK REFERENCE GUIDE

Getting Started www.pruxpress.com

Register online

Once registered, sign-up for Proactive Case Status Email

- ▶ From the New Business drop-down menu select "Life Case Status" to launch the Life Case Status splash page. Select "Launch eSubscribe". Navigate through and select your options.



Prudential is one of the largest financial services institutions in the United States, offering a broad range of financial products and services for people in the United States and abroad. Prudential, with its distinctive Rock logo, is among the most enduring brands in U.S. corporate history. The company's long history is a testament to the quality of service it has provided its customers. In addition to the level of service, Prudential is recognized for the breadth of products and services it provides and continues to be recognized as a company providing quality financial services at home and abroad.



Search Tools

- ▶ **Easy-to-use Navigation:** To help you find information quickly.
- ▶ **My Shortcuts:** Allows you to create custom links to the pages most important to you.
- ▶ **Advanced Search:** An option to further refine your search criteria.
- ▶ **Marketing Material Lists:** Can be filtered by Category, Audience, Title, Edition Date, Expiration Date, IFS/Control Number
- ▶ **Case Status Homepage Shortcut:** Allows you to enter a policy number to go directly to a case. Your case details are one click away.

SEARCH TIPS – USING KEYWORDS, IFS OR CONTROL NUMBER

- ▶ IFS or Control Number (Compliance reference number) Search — Type the number into the Keyword field. **IMPORTANT!** Numeric searches only look in the IFS/Control Number field. For material with a number in its name, put the search phrase in double quotes.
- ▶ To search for independent words, use AND between words and enclose one of the words or phrases in double quotes. Example: Living AND “benefit” AND Kentucky will return all pieces for Living Needs Benefit in Kentucky.
- ▶ To search for a phrase and a keyword together, use double quotes around the phrase. Example: “death benefit” AND sales.
- ▶ Use the word OR between words to broaden your search. Enclose one of the words in double quotes. Example: child OR “parent” OR times.
- ▶ The “*” asterisk wildcard is also allowed. Example: the search: “Under*” returns records containing words such as “Underwriting” and “Understanding.” Be sure to enclose both the asterisk and text fragment in double quotes.

Products & Marketing

PRODUCTS

- ▶ Obtain the latest information and state approvals for our Life and Long-Term Care products.
- ▶ Use the Features Summary tab for each product to see capacity, issue age, state availability and more.
- ▶ Check the Discontinued Life Products list for important information about our legacy products.

MARKETING

- ▶ **Advanced Marketing** • Business & Executive Benefit Planning • Estate Planning • Charts • Frequently Asked Questions • Guides and Model Documents • Leimberg Reports • Personal Needs & Retirement Planning • Producer Sales Ideas and Select Solutions Kits • Promotional Materials/Vendor Information • Seminars • Brainsharks • Tax and Legislative Updates
- ▶ **General Marketing** • Marketing to Women • Spotlight on Prudential • Retirement Red Zone • e-Newsletters
- ▶ **Multi-Cultural Marketing Materials** In-language material that’s culturally and linguistically accurate.
- ▶ **Product Marketing** Find consumer brochures & marketing material for our Life and Long-Term Care products.
- ▶ **Financial Institutions** Prudential currently does business with 100 financial institutions and has agreements with over 350 others. This page is designed to provide you with the most up-to-date general and institutional-specific marketing material.



New Business

ILLUSTRATIONS

- ▶ **Online Illustrator:** Access our easy-to-use Online Illustrator to run a life illustration or term quote.
- ▶ **Illustration Software:** Download illustration software and updates for both Life and Long Term Care. Learn more about our other illustration options.
- ▶ **Quotes and Estimates:** Run an automated instant underwriting quote to get a ballpark estimate on a case with simple medical impairments or unique avocations.

LICENSING & APPOINTMENTS

- ▶ **Licensing & Appointments:** Get Licensing and Appointment forms, notices about important regulatory alerts and schedules
- ▶ **Licensing and Appointment Inquiry:** See a listing of your contact numbers and appointment details.

LIFE & LTC CASE STATUS

- ▶ **Case Status:** Obtain instant access to Life and LTC case status in real time. Detailed status requirements are listed for each application with two-way communication.
- ▶ **Proactive Case Status E-mail Notification:** Sign-up for proactive email notification and obtain new business life case status.

SERVICE GUIDES

- ▶ Information on the technology and services we offer, including App Upload, Data Feeds, and more.

UNDERWRITING

- ▶ **Rx for Success:** Access Rx for Success, a library of information on over 150 different medical impairments and underwriting issues.
- ▶ **Underwriting Highlighters and Materials:** See information about our classifications, procedures and competitive advantages.

Post Issue

- ▶ **Compensation Statements:** Access online compensation statements.
- ▶ **Inforce Online Illustrations:** Run Inforce online illustrations.
- ▶ **Inforce Policies:** Look up information about inforce policies that you have sold.
- ▶ **Post Issue Service and Transaction Rules:** Find post-issue service & transaction rules.
- ▶ **Variable Performance:** Look at Variable Performance: Monthly Performance Reviews, Daily Unit Values, Prospectuses, new Money Rates

Forms

- ▶ Access all the forms you need to do business with Prudential. Our “i-Go” fillable forms wizard is also available!
- ▶ Innovative “kitting” tool allows creation of form kits.

Reference

eNEWS & LIFE NEWS REPORTS

- ▶ An archive of our weekly eNEWS and our Life News Reporter communications.

TEAM LIST

- ▶ Contact information for your team of dedicated professionals.

CONTACT EXPERTS

- ▶ Submit your questions on-line, and they’ll be directed to an expert in the field you are inquiring about.

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