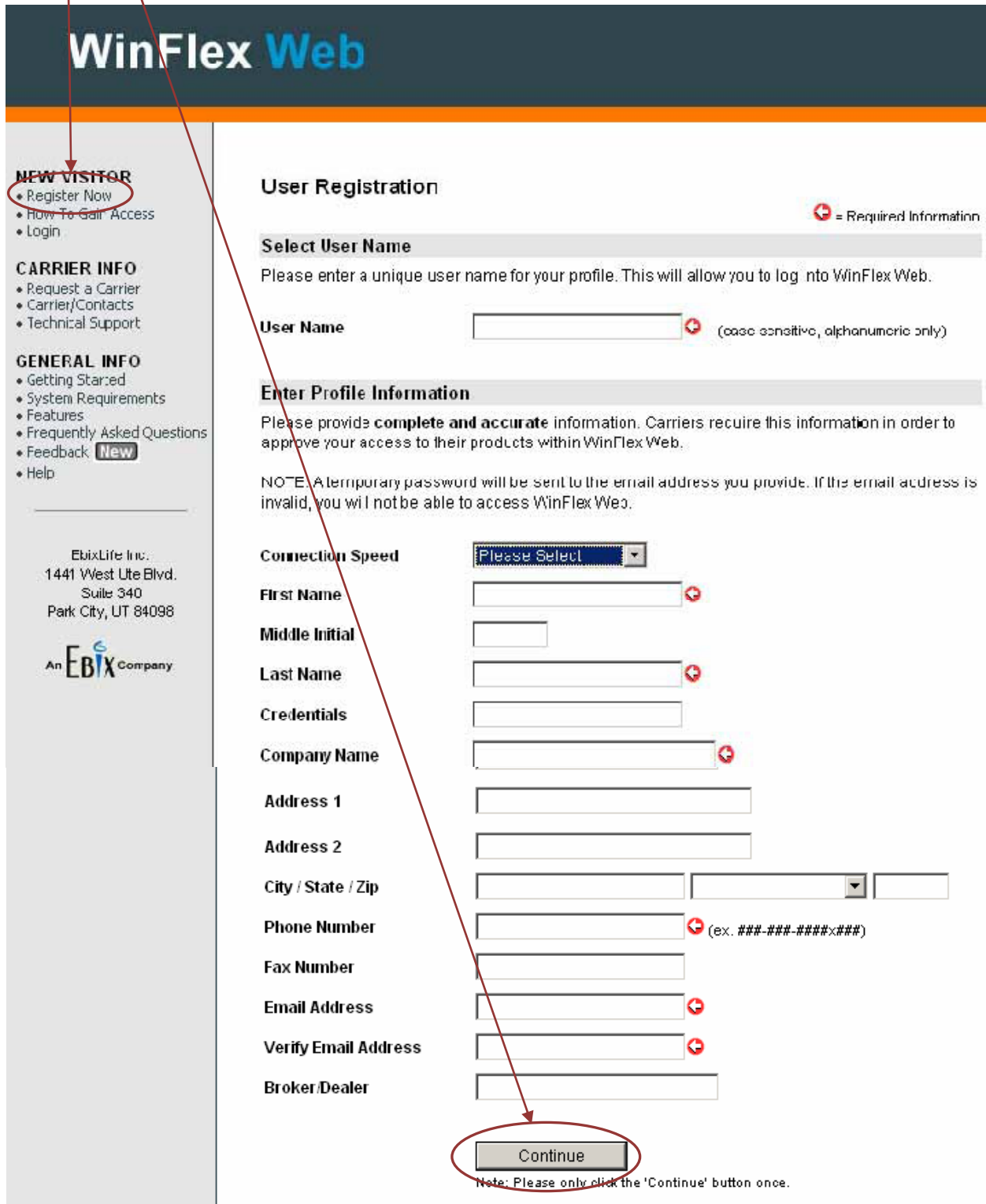


## Winflex Web Registration Instructions

In Internet explorer address box, type in the following: [www.winflexweb.com](http://www.winflexweb.com).

Click "**Register Now**" on the left hand side of the screen, the following screen should appear. Complete this form and click "**Continue**" at the bottom.



**WinFlex Web**

**NEW VISITOR**

- Register Now
- How To Gain Access
- Login

**CARRIER INFO**

- Request a Carrier
- Carrier/Contacts
- Technical Support

**GENERAL INFO**

- Getting Started
- System Requirements
- Features
- Frequently Asked Questions
- Feedback **New**
- Help

EbixLife Inc.  
1441 West Ute Blvd.  
Suite 340  
Park City, UT 84098

An **EBIX** Company

### User Registration

**Select User Name**

Please enter a unique user name for your profile. This will allow you to log into WinFlex Web.

**User Name**  (case sensitive, alphanumeric only)

**Enter Profile Information**

Please provide **complete and accurate** information. Carriers require this information in order to approve your access to their products within WinFlex Web.

NOTE: A temporary password will be sent to the email address you provide. If the email address is invalid, you will not be able to access WinFlex Web.

**Connection Speed**

**First Name**

**Middle Initial**

**Last Name**

**Credentials**

**Company Name**

**Address 1**

**Address 2**

**City / State / Zip**

**Phone Number**  (ex. ###-###-####x###)

**Fax Number**

**Email Address**

**Verify Email Address**

**Broker/Dealer**

**Continue**

Note: Please only click the 'Continue' button once.

Select **Advanced Planning Services, Inc.** from the Agency/BGA list and click **“Continue Registration.”**

WinFlex Web
Research

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**NEW VISITOR**

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- Help

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EbizLife Inc.  
1441 West Ute Blvd.  
Suite 340  
Park City, UT 84098

An Company

### Agency/BGA Selection

If you belong to an Agency or BGA in the list below, please select that organization. Otherwise, please continue to the next step.

**Why should I choose an Agency/BGA?**

- Immediate access to all Agency/BGA approved carriers
- Automatic addition of new Agency/BGA carriers
- No waiting for individual carrier approvals

**Search Tips:**

- If no results are found, make sure all words are spelled correctly; try different names or a more general name.
- If too many results are found, try entering a more specific name.

Search

**Page 1 of 70**

Select One	Agency/BGA	Parent Organization
<input type="radio"/>	1st Financial Securities	
<input type="radio"/>	1st Global	
<input type="radio"/>	21st Century Planning, Inc.	NFP
<input type="radio"/>	3 Mark Financial	
<input type="radio"/>	4 Texas Insurance Services, Inc.	
<input type="radio"/>	401(k) Advisors, Inc.	NFP
<input type="radio"/>	A F Smith & Associates, Inc.	
<input type="radio"/>	A+ Marketing Services	
<input type="radio"/>	AAvantage Insurance Group	
<input type="radio"/>	Abbott Insurance and Financial Services	
<input type="radio"/>	ABS Associates of NY In.	
<input type="radio"/>	Acoma Insurance	
<input type="radio"/>	Acordia of West Virginia	
<input type="radio"/>	Adams & Adams Corp	
<input type="radio"/>	Adcock Financial Group	NFP
<input checked="" type="radio"/>	<b>Advanced Planning Services</b>	
<input type="radio"/>	Advanced Professionals	NFP
<input type="radio"/>	Advanced Settlements, Inc.	NFP
<input type="radio"/>	Advicrs Financial Group	
<input type="radio"/>	Advicrs Financial Services, LLC	NFP

1 2 3 4 ... Clear Selection

The next screen will show a confirmation of carriers available with Advanced Planning Services, Inc.:

The screenshot shows the WinFlex Web interface. At the top, the logo "WinFlex Web" is on the left and the date "February 9, 2011" is on the right. A navigation menu on the left includes sections for "NEW VISITOR", "CARRIER INFO", and "GENERAL INFO". The main content area is titled "Companies in My Profile" and is divided into two sections: "Agency Companies - (Advanced Planning Services)" and "Request Non-Participating Companies". The "Agency Companies" section lists various insurance carriers in a grid. The "Request Non-Participating Companies" section lists several other carriers with checkboxes. A "Complete Registration" button is located at the bottom right, with a red arrow pointing to it from the text below.

**WinFlex Web** February 9, 2011

**NEW VISITOR**

- Register Now
- How To Gain Access
- Login

**CARRIER INFO**

- Request a Carrier
- Carrier/Contacts
- Technical Support

**GENERAL INFO**

- Getting Started
- System Requirements
- Features
- Frequently Asked Questions
- Feedback **New**
- Help

EbixLife Inc.  
1441 West Lite Blvd.  
Suite 340  
Park City, UT 84098

An **EBIX** Company

**Companies in My Profile**

**Agency Companies - (Advanced Planning Services)** Companies available in the agency you have chosen

AIG AG - Independent Agency Group	John Hancock	Mutual of Omaha Health
Allianz Life	John Hancock USA/New York	Nationwide
Genworth Life Insurance Company	Lincoln Benefit Life	Principal Financial Group
Genworth Life of NY	Lincoln Life	Prudential
GLAIC Fixed Life (formerly FCL)	MassMutual	Sun Life
GLICNY Fixed Life (formerly AML)	MassMutual	Transamerica
ING Life	MetLife - TLA	West Coast Life (Annuity Products)
Jefferson-Pilot	Mutual of Omaha - United of Omaha	West Coast Life Ins. Co.

You may show your interest to companies that are not currently participating on WinFlex Web. To show your interest, select the company(s) below and click [Complete Registration].

**Request Non-Participating Companies** Companies which are not currently available in WinFlex Web but you can notify of your interest

<input type="checkbox"/> American National	<input type="checkbox"/> Guardian	<input type="checkbox"/> Phoenix - Merrill Lynch
<input type="checkbox"/> Demo Company	<input type="checkbox"/> NACOLAH	<input type="checkbox"/> The Hartford
<input type="checkbox"/> F&G	<input type="checkbox"/> Phoenix - BGA	

**Complete Registration**

Click the "**Complete Registration**" button.  
You should receive a temporary password to access the site emailed to you.

When you first log in, you may not have any carriers available to you immediately, and you will see the following:

**WinFlex Web** Welcome Al February 9 PM 6

**HOME**

- Start WinFlex Web
- WinFlex Express
- WinFlex Web Home
- Logout

**MANAGE**

- Agents
- Groups
- Profile

**CARRIER INFO**

- Request a Carrier
- Carrier/Contacts
- Technical Support

**TOOLS**

- Integrate Vitalsigns

**GENERAL INFO**

- Getting Started
- System Requirements
- Features
- Frequently Asked Questions
- Feedback: **New**
- General Help

EbixLife Inc.  
1918 Prospector Avenue  
Park City, UT 84060

An **EBIX** Company

**Add Companies (alintag)**

My Profile | **Add Companies** | **Password** | Update Info | Preferences | My Stats | Custom Defaults

You have not yet received approval from any of your requested carriers or agencies. You will not be able to access the majority of WinFlex Web until you have received approval from at least one carrier. You may request additional carriers below or click on "My Profile" to see your pending carrier requests.

**Available Companies** Companies from which you can request approval **Place Request**

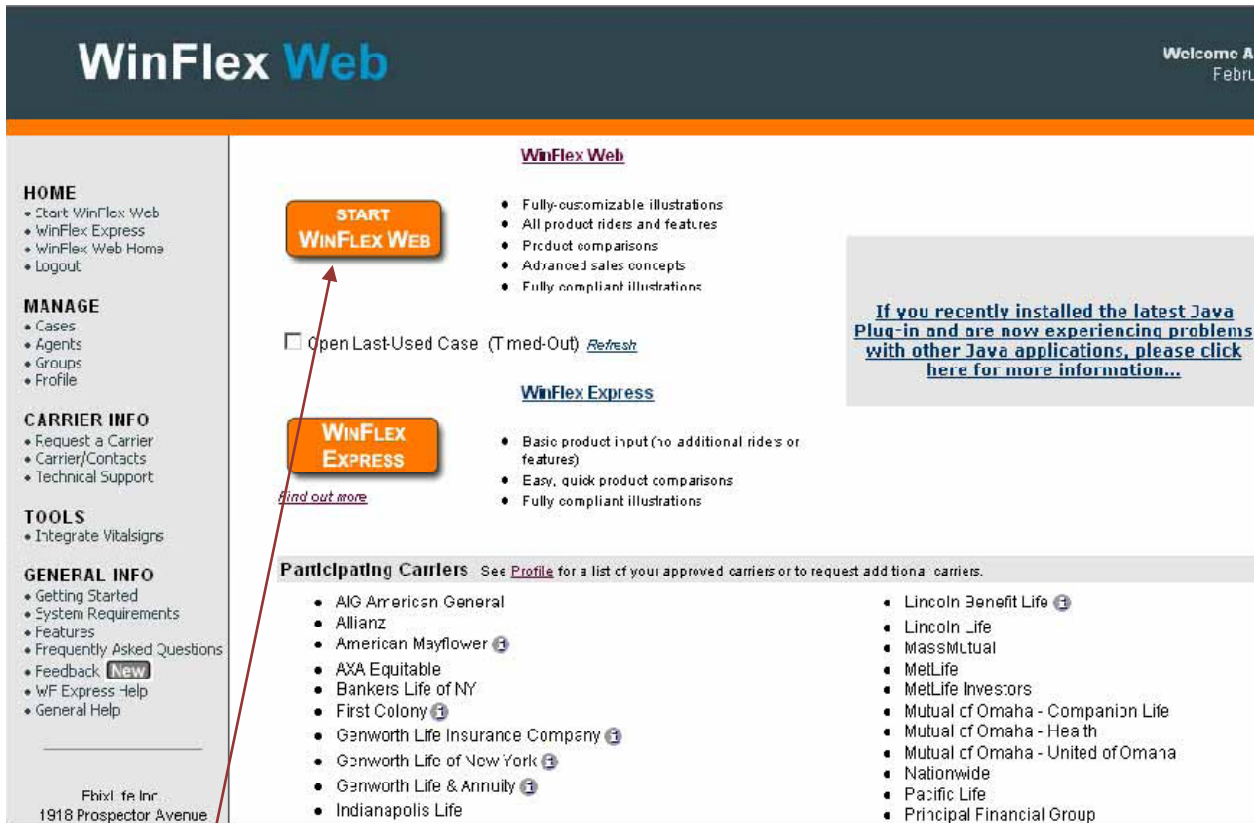
Company Name	Agent Code
<input type="checkbox"/> AIG AG - Independent Agency Group	<input type="text"/> +
<input type="checkbox"/> AIG Life Brokerage	<input type="text"/> +
<input type="checkbox"/> Allianz Life	<input type="text"/>
<input type="checkbox"/> Bankers Life of NY	<input type="text"/>
<input type="checkbox"/> Indianapolis Life	<input type="text"/>
<input type="checkbox"/> Jefferson-Pilot	<input type="text"/> +
<input type="checkbox"/> John Hancock	<input type="text"/>
<input type="checkbox"/> Lincoln Life	<input type="text"/>
<input type="checkbox"/> MassMutual	<input type="text"/>
<input type="checkbox"/> MetLife - TLA	<input type="text"/>
<input type="checkbox"/> Mutual of Omaha - Companion Life	<input type="text"/>
<input type="checkbox"/> Mutual of Omaha - United of Omaha	<input type="text"/>
<input type="checkbox"/> Mutual of Omaha Health	<input type="text"/>
<input type="checkbox"/> Nationwide	<input type="text"/>
<input type="checkbox"/> Principal Financial Group	<input type="text"/>
<input type="checkbox"/> Protective Life	<input type="text"/>
<input type="checkbox"/> Protective Life & Annuity (NY only)	<input type="text"/>
<input type="checkbox"/> Prudential	<input type="text"/>
<input type="checkbox"/> Sun Life	<input type="text"/>
<input type="checkbox"/> Transamerica	<input type="text"/>
<input type="checkbox"/> West Coast Life (Annuity Products)	<input type="text"/>
<input type="checkbox"/> West Coast Life Ins. Co.	<input type="text"/> +

Can't find a company on this list? [Click here](#) to view a full list of Participating WinFlex Web Companies.

+ = Agent Code is required for this company

From the blue tabs along the top, select **Password** and change your password to something you will remember and **RECORD** this somewhere safe as we are not able to re-set this for you if you forget it.

In a few minutes, check your messages again, this time, for the Agency Approval email. Log back into Winflex Web and you will see the following:



**WinFlex Web**

Welcome A  
Febru

**HOME**

- Start WinFlex Web
- WinFlex Express
- WinFlex Web Home
- Logout

**MANAGE**

- Cases
- Agents
- Groups
- Profile

**CARRIER INFO**

- Request a Carrier
- Carrier/Contacts
- Technical Support

**TOOLS**

- Integrate Vitalsigns

**GENERAL INFO**

- Getting Started
- System Requirements
- Features
- Frequently Asked Questions
- Feedback **New**
- WF Express Help
- General Help

1918 Prospector Avenue

**START WINFLEX WEB**

- Fully-customizable illustrations
- All product riders and features
- Product comparisons
- Advanced sales concepts
- Fully compliant illustrations

Open Last-Used Case (Time-Out) [Refresh](#)

**WINFLEX EXPRESS**

[find out more](#)

- Basic product input (no additional riders or features)
- Easy, quick product comparisons
- Fully compliant illustrations

**Participating Carriers** See [Profile](#) for a list of your approved carriers or to request additional carriers.

- AIG American General
- Allianz
- American Mayflower <sup>+</sup>
- AXA Equitable
- Bankers Life of NY
- First Colony <sup>+</sup>
- Genworth Life Insurance Company <sup>+</sup>
- Genworth Life of New York <sup>+</sup>
- Genworth Life & Annuity <sup>+</sup>
- Indianapolis Life
- Lincoln Benefit Life <sup>+</sup>
- Lincoln Life
- MassMutual
- MetLife
- MetLife Investors
- Mutual of Omaha - Companion Life
- Mutual of Omaha - Health
- Mutual of Omaha - United of Omaha
- Nationwide
- Pacific Life
- Principal Financial Group

**If you recently installed the latest Java Plug-in and are now experiencing problems with other Java applications, please click here for more information...**

Click "[Start WinflexWeb](#)" button.



You will be prompted to create a default agent. Now, you can begin running illustrations for the following carriers.

Company
AIG AG - Independent Agency Group
Allianz Life
Genworth Life Insurance Company
Genworth Life of New York
GLAIC Fixed Life (formerly FCL)
GLICNY Fixed Life (formerly AML)
ING Life
Jefferson Pilot
John Hancock
Lincoln Benefit Life
Lincoln Life
MesaMutual
MetLife - MLA
Mutual of Omaha - Health
Mutual of Omaha - United of Omaha
Nationwide - OS
Principal Life
Prudential
Sun Life Financial
Transamerica
West Coast Life (Annuity Products)
West Coast Life Ins. Co.

If you have any questions or are having problems, please contact:

Advanced Planning Services  
1500 State Street, Suite 220, San Diego, CA 92101  
Phone: 619-220-8116  
Fax: 619-220-0836  
[it@apshome.com](mailto:it@apshome.com)  
Website: [www.apshome.com](http://www.apshome.com)