Income Distribution System

THRIVE®

An innovative retirement income solution you've never heard of!

Home Page

Look and feel, content, and materials configurable by institution

Wealth of easily-downloaded marketing and sales materials

Getting Started resource for new users

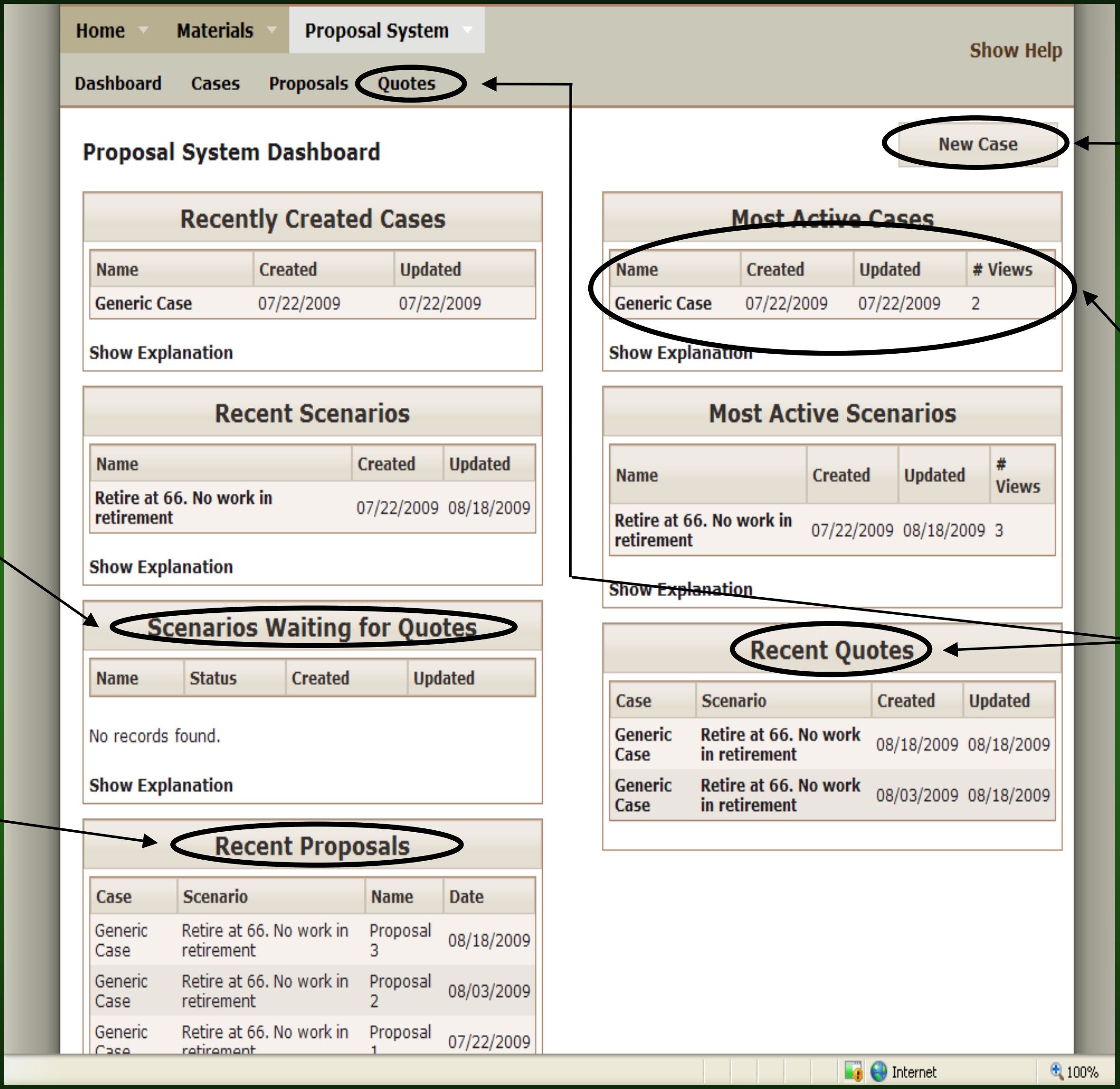
Large library of training and support resources

Sales tips, software tips, and success stories shared through a frequently-updated blog

Extensive help and support information

Proposal System Dashboard

Overview of all client case activity, summarized and sorted for easy review



Single click to start a new client case

Cases archived indefinitely for retrieval at any time

Clear reminder of cases requiring quotes

Quickly access quote details

List of client proposals awaiting for delivery or client response

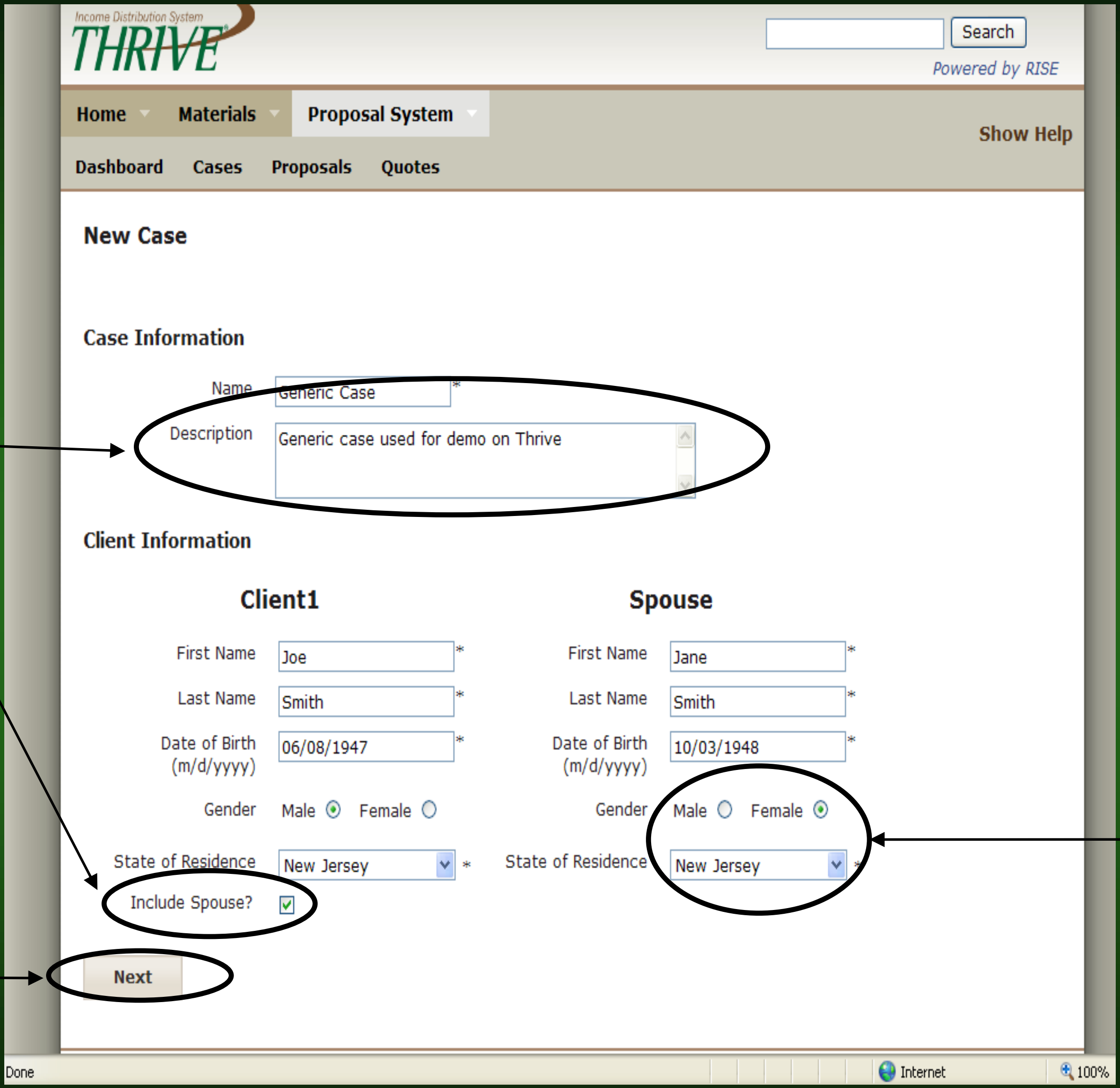
Creating a New Case

Only 10 minutes to enter a case from start to finish

Space for additional client background and details

Spouses can be excluded or included for thorough joint planning

Clear navigation guides the advisor



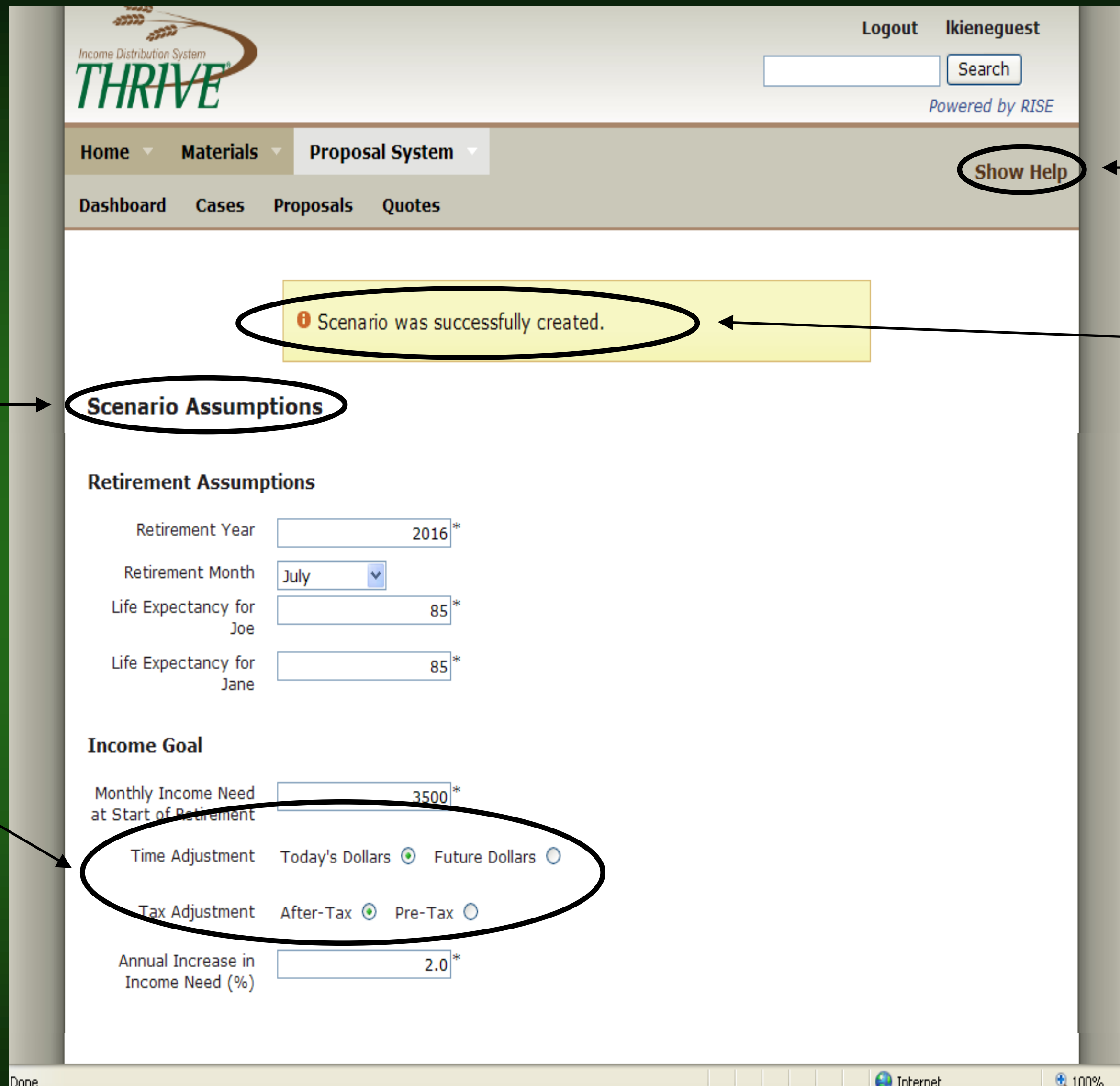
Straightforward case input screens follow the flow of the client fact finder

Basic client information flows to each scenario

Drop-downs and buttons for easy entry

Scenario Assumptions

Minimal set of inputs are required



Context-sensitive help

Validation of data entered assures accuracy

Multiple scenarios possible for each client case, allowing what-if analysis and client choice

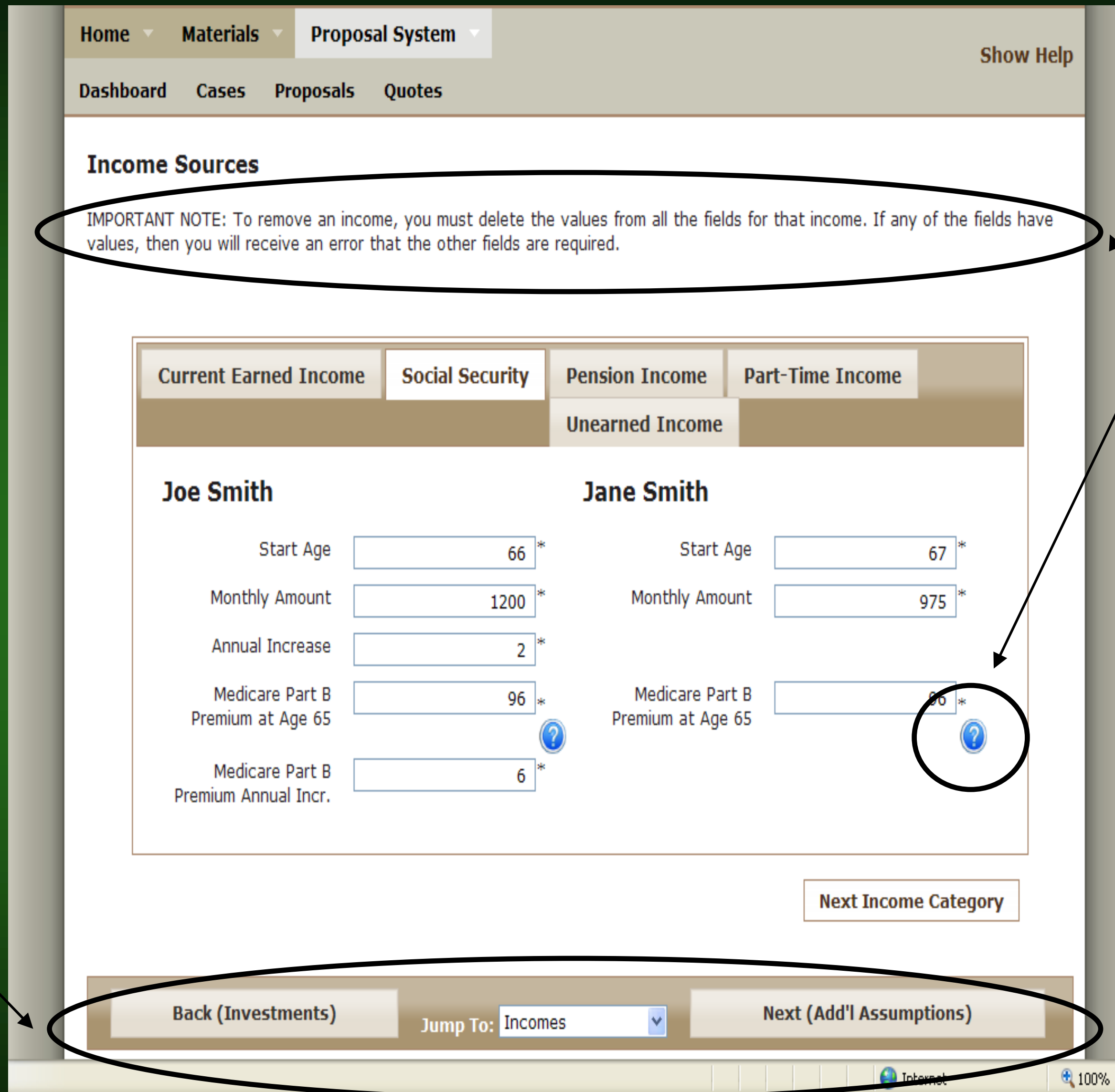
Flexible input formats match advisor and client preferences

Income Sources

Multiple income sources are taken into account

Separate client and spouse inputs provide accuracy

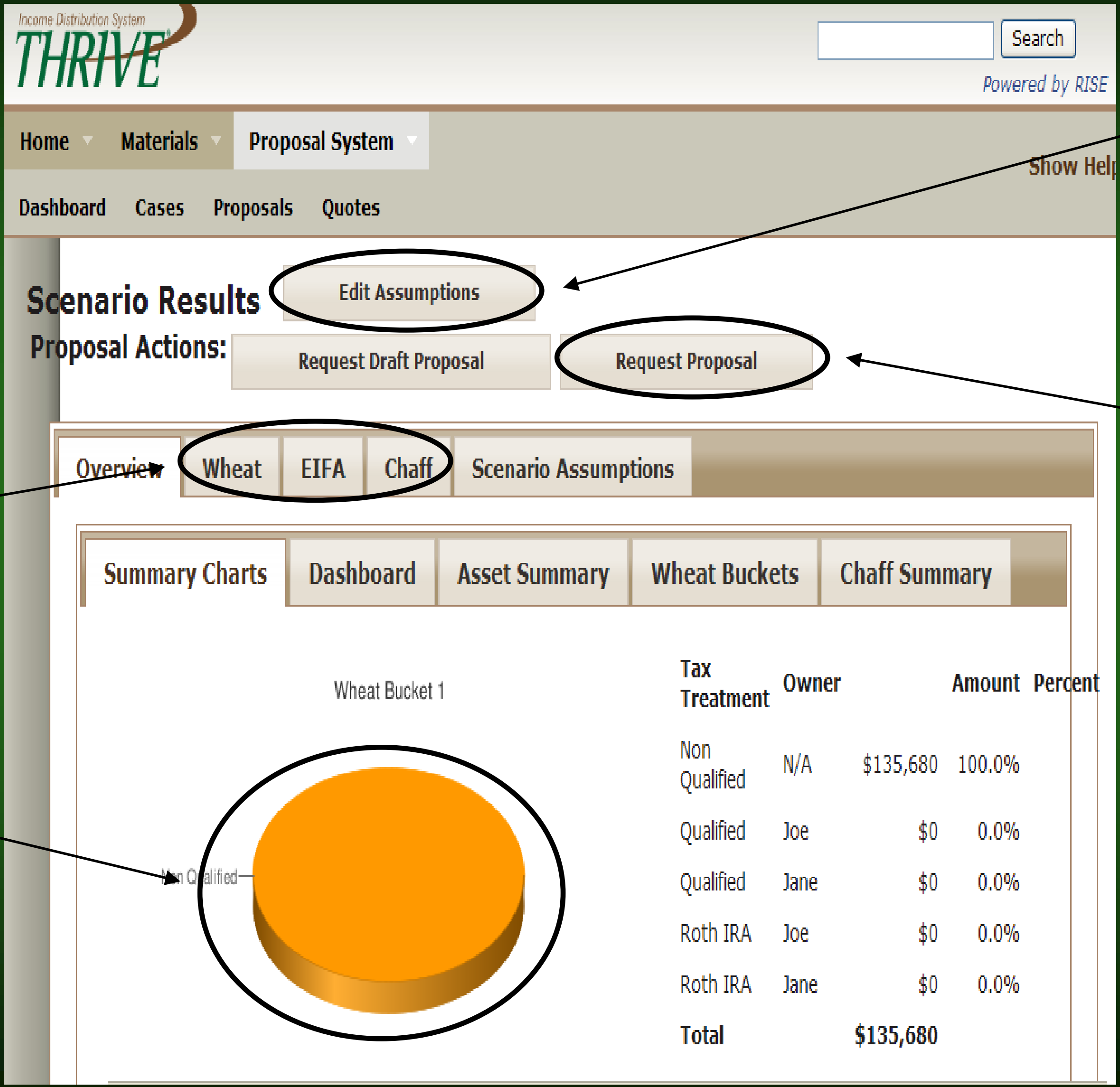
Choice of navigation options provides quick access to information



Hovertips, helpers, and on-screen messages give guidance in context

Results and Proposal

Summary results show all relevant information, including income generated and assets required



One-click access to revise any scenario assumptions

Client-friendly proposal includes actual contract quotes

Ability to drill down for detailed results and analysis

Recommended contracts/sales opportunities clearly indicated

Graphics enable easy understanding of results