



Wealthy and Wise® Importing Executive Bonus Data from the InsMark Illustration System

Note re Years to Illustrate: In most cases, you will want to make sure the number of years the executive bonus data is illustrated are the same number of years the Wealthy and Wise data is illustrated.

Assume you are using the Executive Security Plan module in the InsMark Illustration System to reflect an executive bonus plan. When you finish inputting your case data and are satisfied with the results, look for this icon on the lower right of your input screens while in Edit mode:



Clicking the Export command transfers the insured's portion of costs and values directly to InsMark Source Data Storage which is accessible from Wealthy and Wise. You will be asked for a source data notation -- enter a phrase that will allow you to remember this version of source data.

In Wealthy and Wise, you can import this stored data using one of the drop-down selections located on the **Other Assets / Inside the Estate** tab. Look for this icon on the right side of the drop-down data entry screen:



When you click "Import", you will go to Source Data Storage where you should select your recently exported executive bonus data. It will automatically populate the array.

Click OK, and you're ready to have this Wealthy and Wise scenario reflect the presence of the benefit and its costs, if any.

Note: InsMark's Cloud-Based Documents On A Disk™ has comprehensive specimen documents for all variations of an Executive Bonus Plan (including one featuring a Controlled Bonus).