



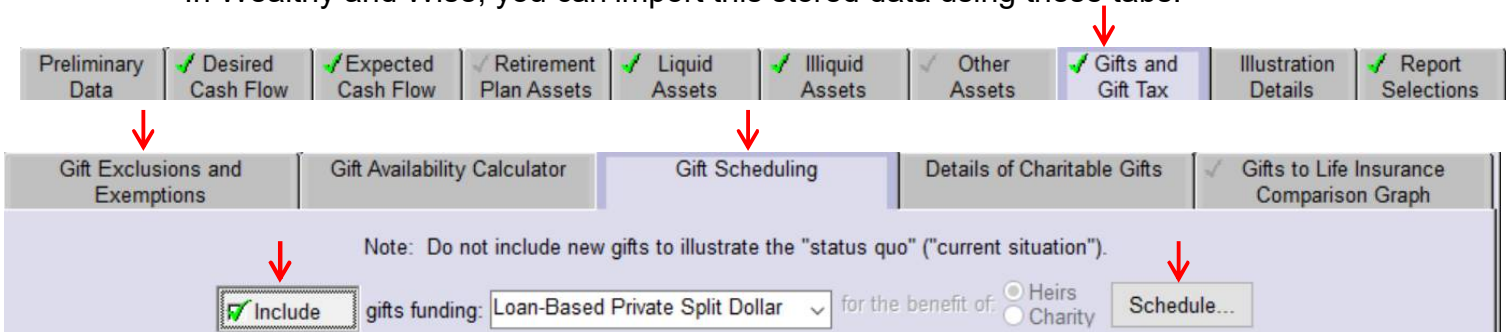
Importing Data from Loan-Based Private Split Dollar into Wealthy and Wise

Assume you are using the InsMark Loan-Based Split Dollar System to present a grantor trust-owned Loan-Based Private Split Dollar arrangement. 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:



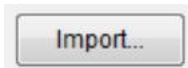
Clicking on Export will take the trust's portion of costs and values directly to our Source Data storage files which are accessible by Wealthy and Wise. You will be asked for a source data notation -- enter a phrase that will allow you to remember this version of source data.

In Wealthy and Wise, you can import this stored data using these tabs:



Note: In this example, "gifts" refer to gifts to the trust so it has the funds to pay the loan interest to the lender. If loan interest has been accrued, there will be no gifts illustrated in the imported source data, and the premium financing data will be suitably reflected in Wealthy and Wise.

After you click "Schedule", look for this icon on the right side of the next screen:



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

Click OK, and you're done.