

Fast•Class File

Client Data System

Dynamic Report Download

LTC Prospecting

Recent research has shown that individuals between 40 and 55 years old have a heightened awareness of the need for good retirement planning – including the importance of having LTC coverage. Individuals between 40 and 55 years old have parents about to retire or are already retired and in some cases, must care for their retired parents. This heightened awareness can make individuals between 40 and 55 years old ideal prospects for LTC products.

This Dynamic Report will identify LTC Prospects between the ages of 40 and 55 years old, with some form of life insurance, and an income of \$50,000 or greater.

Loading Files into CDS:

- From the main screen in CDS, select **Database** in the menu bar and then select **Utilities**.
- In the **Utilities** menu, select **Load Data**.

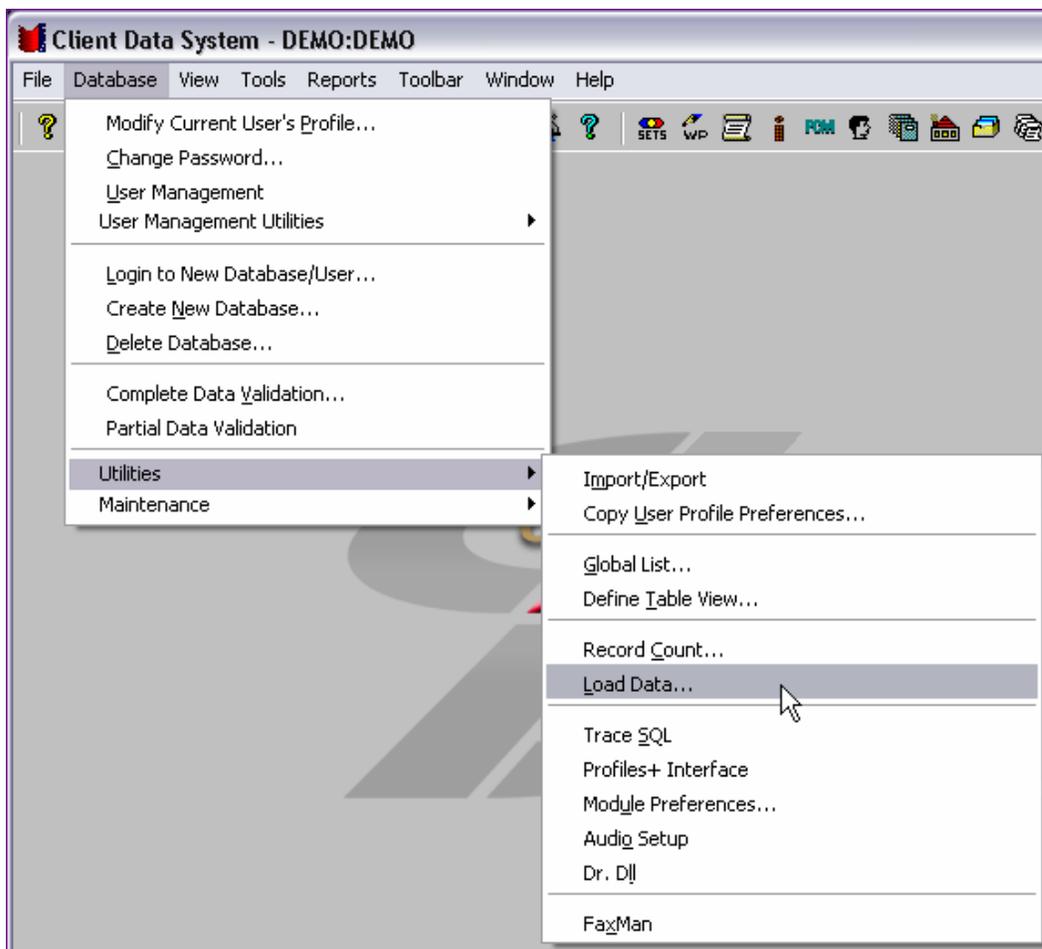


Figure 1: The Utilities menu (Load Data option selected).



- Select the **Other Files (*.dmp)** option in the **Select Data Load Options** window.



Figure 2: The Select Data Load Options window.

- Click **OK**.
- When the **Load File** window opens, use the **Look in** drop-down field to locate the **LTC_Pro** folder.

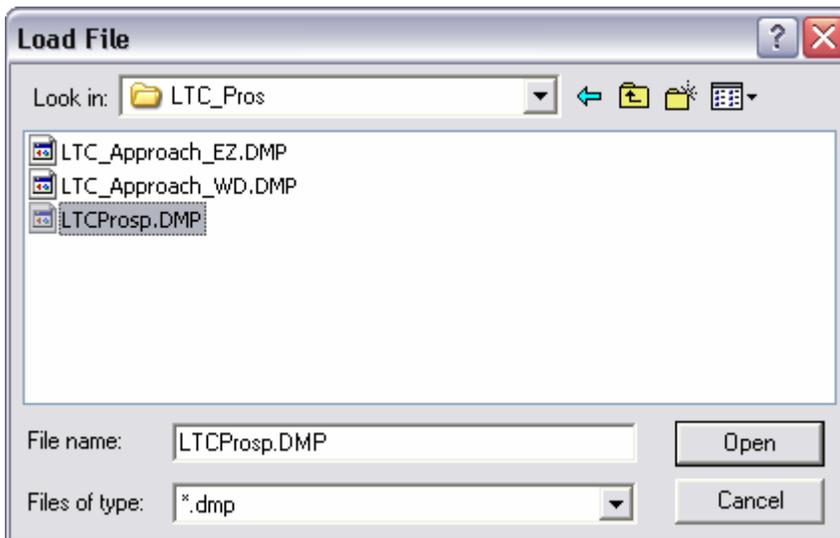


Figure 3: The contents of the LTC_Pro folder viewed from the Load File window.

The **LTC_Pro** folder contains three .DMP files:

- The **LTCProsp.DMP** containing the LTC Prospects dynamic report with included filters.
 - The **LTC_Approach_WD.DMP** file with the LTC Approach letter in Microsoft Word format.
 - The **LTC_Approach_EZ.DMP** file with the LTC Approach letter in E-Z Editor format.
- Select the **LTCProsp.DMP** file and click **Open**. The LTC Prospects dynamic report with filters will be loaded into CDS.
 - Using the same process (Starting from the main screen of CDS, select **Database > Utilities > Data Load...**), load one of the included approach letters.

Using the LTC Prospects Dynamic Report:

- Select **Reports** from the main screen of CDS.
- In the **Reports** menu, select **Dynamic Reports**.
- In the **Description** search field, type **LTC** and click **OK**.
- A summary screen will open with the **LTC Prospects** dynamic report on display.
- To modify the dynamic report or view the filter criteria of the attached filters – select the **LTC Prospects** dynamic report and click the **Modify Record** button.

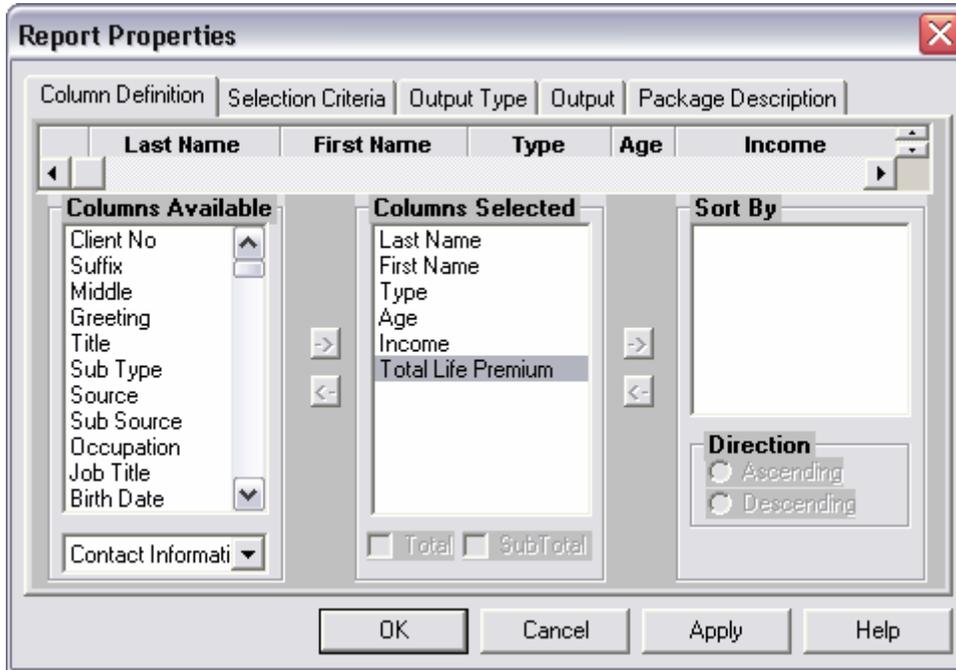


Figure 4: The Report Properties window of the LTC Prospects dynamic report.

- To run the **LTC Prospects** dynamic report, double-click the report or select the report and click the **Run** button.



Figure 5: The Run button in the Report Selection Summary screen.

Using the LTC Prospect Approach Letter:

- After running the **LTC Prospects** dynamic report, select records in the results and click the **Spreadsheet Correspondence** button.
- Select **Form Letter** in the **Spreadsheet Correspondence** window.
- Enter **LTC** in the **Description** field of the **Find Form Letter** window and click **OK**.
- Select the **LTC Prospect Approach** letter and other options in the **Print/Fax/E-mail Form Letter** window and click **Print**.

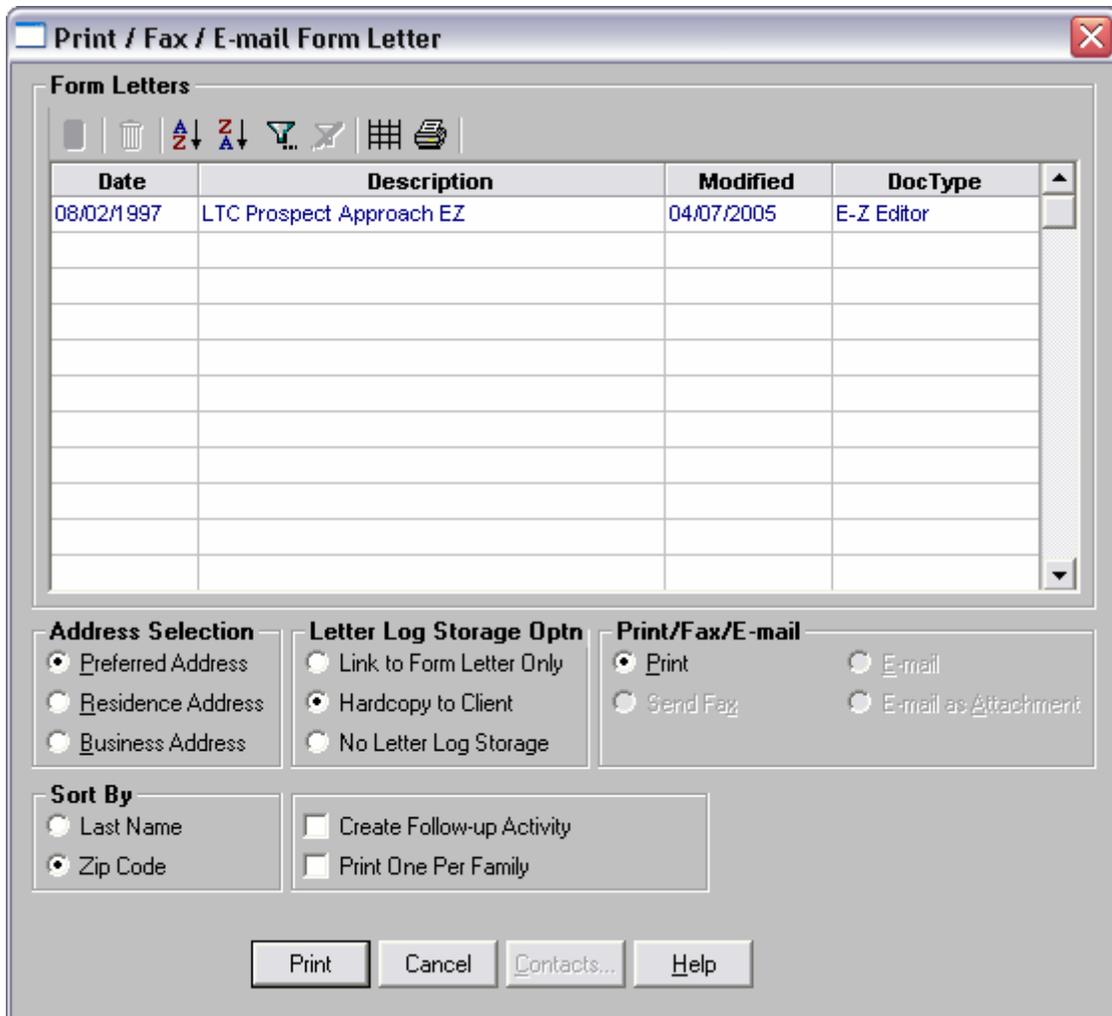


Figure 6: The Print/Fax/E-mail Form Letter window.

- Review the letters and click **Print** to send to prospects.

Modifying the LTC Prospect Approach Letter:

- From the main screen in CDS select **Tools** in the main menu and then select **Form Letter Maintenance**.
- Enter **LTC** in the **Description** field of the **Find Form Letter** window and click **OK**.
- Select the **LTC Prospect Approach** letter in the **List of Form Letters** summary screen and click the **Modify Record** button.



Figure 7: LTC Prospect Approach Letter (Microsoft Word version).

- Modify as needed.
- When finished, close the document and (if needed) make any changes to the name of the document in the **Form Letter Description** window and click **OK** to save changes.