

Fast Class File

Client Data System

Volume 104: LTC Prospecting

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. One reason for this heightened awareness is attributed to the fact that 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 Fast Class demonstrates one way of creating a Dynamic Report that will find individuals in the ideal target range, as well as other criteria, that would make contacts ideal prospects for LTC products.

To create a filter to find all contacts between the ages of 40 and 55:

- Select **View** from the main menu.
- Select **Filters**.
- Click **OK** to perform an open search and launch the **Filter Summary** screen.
- Click the **Add** button in the **Filter Summary** toolbar.
- Select the **Contact Information** table in the **Table Name** window.
- In the **Filter Criteria** window, click the **Column Name** drop down and select the **Age** column.
- Select the **Range** operator in the **Operation** section of the **Filter Criteria** window.
- Type **40** in the **Value** field and click the **Add** button.
- Type **55** in the **Value** field and click the **Add** button.

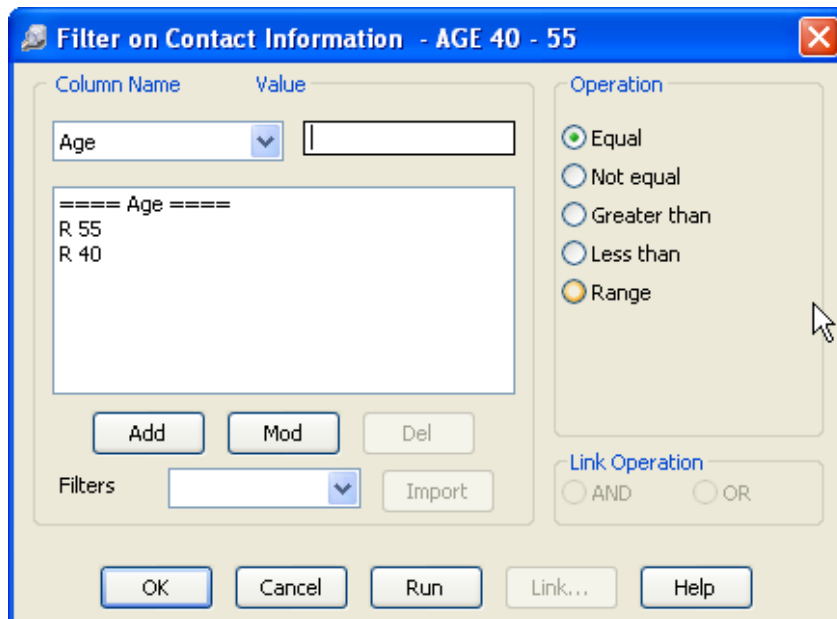


Figure 1: The Filter Criteria screen (criteria to find contacts between 40 and 55 years old)

- Click **OK** and give the filter a name.
 - The new filter will appear in the **Filter Summary** screen.
- To create a filter to find all contacts with life insurance but LTC coverage –
- Select **View** from the main menu.
 - Select **Filters**.
 - Click **OK** to perform an open search and launch the **Filter Summary** screen.
 - Click the **Add** button in the **Filter Summary** toolbar.
 - Select the **Contact Information** table in the **Table Name** window.
 - In the **Filter Criteria** window, click the **Column Name** drop down and select the **Total Life Premium** column.
 - Leave the **Value** field blank. (A blank **Value** field represents a NULL value)
 - Select the **Greater than** operator in the **Operation** section of the **Filter Criteria** window.
 - Click the **Add** button.
 - Click the **Column Name** drop down and select the **LTC Prem** column.
 - Leave the **Value** field blank.
 - Select the **Equal** operator in the **Operation** section of the **Filter Criteria** window.
 - Click the **Add** button.

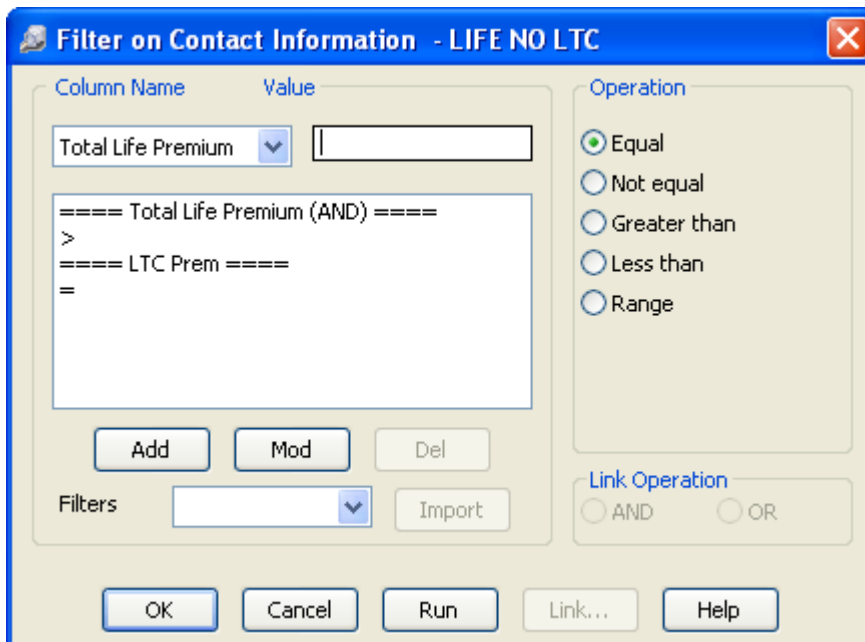


Figure 2: The Filter Criteria screen (criteria to find contacts with life coverage but no LTC coverage)

- Click **OK** and give the filter a name.
- The new filter will appear in the **Filter Summary** screen.

To create a filter to find all contacts with an income greater than \$50,000:

- Select **View** from the main menu.
- Select **Filters**.
- Click **OK** to perform an open search and launch the **Filter Summary** screen.
- Click the **Add** button in the **Filter Summary** toolbar.

- Select the **Contact Information** table in the **Table Name** window.
- In the **Filter Criteria** window, click the **Column Name** drop down and select the **Income** column.
- Enter 50000 in the **Value** field blank.
- Select the **Greater than** operator in the **Operation** section of the **Filter Criteria** window.
- Click the **Add** button.

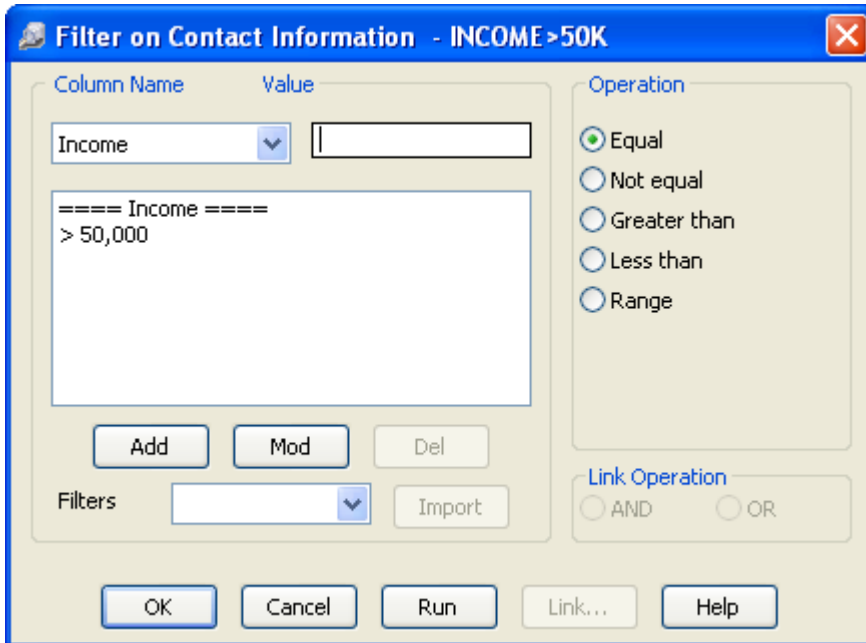


Figure 3: The Filter Criteria screen (criteria to find contacts with income greater than \$50,000)

- Click **OK** and give the filter a name.
- The new filter will appear in the **Filter Summary** screen.

To create a Dynamic Report that will find all contacts meeting the criteria for ideal LTC prospects (between 40 – 55, income greater than \$50,000, and life insurance holders with no LTC policy):

- Select **Reports** in the **Main** menu.
- Select **Dynamic Reports**.
- Click **OK** to perform and open search and launch the **Dynamic Report** summary screen.
- Click the **Add** button to create a new dynamic report.
- Select the **Contact** Information table in the **Select Primary Table** window.
- Click **Next**.
- Define columns as needed in the **Report Column Definition** window. When complete, click **Next**.
- Add the **LIFE NO LTC**, **INCOME > 50K**, and **AGE 40 – 55** filters in the **Report Selection Criteria** window.
- Click **Next**.
- Click **Next**.
- Apply settings as needed in the **Select Output Type** and **Spreadsheet Output**

