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.
• 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.

![Filter Criteria window](image)

**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**
Settings windows.
- Give the report a name in the Report Package Description window.
- Click Finish.
- The new report will be automatically highlighted in the Report summary screen.
- With the report highlighted, click the Run button.

With the ideal prospects identified, approach letters can be generated for each prospect with the Spreadsheet Correspondence button in the Dynamic Report toolbar and follow-up phone calls can be created using the Activities button.

Figure 4: The Dynamic Report showing ideal LTC prospects