

# Income Planning Suite: Solutions for Indexed Annuity Sales.

MCP Premium's Income Planning Suite is an internet software tool ideal for presenting the IA in a retirement income plan. We give you a choice of income plans – Annual Withdrawals or Structured Payments, so you can choose which method works best. Prospects respond to our concise, colorful reports that detail your plan impartially and very professionally. MCP Premium offers you simplicity, flexibility and reliable analysis that is also very affordable. Call 877-773-4774 for details.



Welcome. Please choose a program to use, below.



**EIAAnalyst2007-Lite**  
Annual withdrawals



**ImmStudy-Lite**  
Structured payments



**EIAAnalyst2007 Lite™** Instructions  
Technical Support  
Return to Login Page

Product names are property of their respective companies and are used for identification purposes only. This tool is meant to compare credit method construction and is not intended to illustrate a particular product.

**Part1. Set up your comparison scenario**

Select first item to compare

Company or Item: AIG  
Product or Item: Emerging Edge  
Credit Method: EE100 - Point to Point, SP500 w/100% PR

Select second item to compare

Company or Item: Lincoln Benefit  
Product or Item: Savers Index Annuity I  
Credit Method: SAVph - Point to Point, SP500 w/100% par

Select scenario details

Ending Dates are Dec. 31st. Data through 12/31/2006  
Historical Period: Last 20 years  
Initial Premium: \$175000

Single Report Page Report

(Please click the appropriate button only once, and then watch the progress bar on your browser.)

**Part2. Set up advanced scenario (withdrawals)**

Client's Name: \_\_\_\_\_  
Annual withdrawal \$ \_\_\_\_\_



**ImmStudy™ Lite** Instructions  
Technical Support  
Return to Switchboard

Fill in the yellow fields (IN ORDER) below to prepare an ImmStudy™ Lite Retirement Analysis

Product names are property of their respective companies and are used for identification purposes only. This tool is meant to compare credit method construction and is not intended to illustrate a particular product.

**Income Plan Details**

Client Full Name: John and Jane Doe

Available Assets: \$350000

Required Income (Annual): \$17500

**Phase1. SPIA (5-year)**

Company Name: My Fixed Annuity Co

Product Name: SPIA 5yr

Annual Income (From Above): \$17500

Required Premium: \$98650

**Phase2. SPDA (5-year)**

Company Name: My Fixed Annuity Co

Product Name: SPDA 5yr

Annual Income (From Above): \$17500

Required Premium (From Above): \$98650

Interest Rate: 4.95%

Required Premium (Now): \$77479.15

**Phase3. Deferred EIA (10-year)**

## Key Features include:


- Internet access – no software to install or maintain
- Traditional hypotheticals PLUS our 3-phase guaranteed income plan
- Proprietary EIA Credit Method Ratings reports for most products
- Custom login page that features your logo (*Enterprise license only*)
- Restrict which companies can be used, on an agent-by-agent basis (*Enterprise license only*)
- Prepare reports on agent activity (*Enterprise license only*)
- Flexible payment options with no “per report” or other hidden charges

**www.mcppremium.com**

## About ImmStudy-Lite

ImmStudy-Lite prepares a 10-year structured plan of guaranteed income and deferred growth. The program uses one 5-year single-premium immediate annuity (SPIA), one 5-year deferred fixed annuity (SPDA), and one single-premium equity indexed annuity (EIA) deferred for 10 years.

The internet form is easy to complete, and automatically handles many of the calculations. Only a SPIA quote is needed to fill in the “required premium” field.

 **ImmStudy™ Lite**

[Instructions](#)  
[Technical Support](#)  
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**Fill in the yellow fields (IN ORDER) below to prepare an ImmStudy™ Lite Retirement Analysis**

Product names are property of their respective companies and are used for identification purposes only. This tool is meant to compare credit method construction and is not intended to illustrate a particular product.

**Income Plan Details**

Client Full Name	John and Jane Doe
Available Assets	\$ 350000
Required Income (Annual)	\$ 17500

**Phase1. SPIA (5-year)**

Company Name	My Fixed Annuity Co
Product Name	SPIA 5yr
Annual Income (From Above)	\$ 17500
Required Premium	\$ 98650


**Phase2. SPDA (5-year)**

Company Name	My Ficex Annuity Co
Product Name	SPDA 5yr
Annual Income (From Above)	\$ 17500
Required Premium (From Above)	\$ 98650
Interest Rate	4.95% ▼
Required Premium (Now)	\$ 77479.15

**Phase3. Deferred EIA (10-year)**

Available Assets (From Above)	\$ 350000
Income Premium (Phase 1 + 2)	\$ 176129.15
Balance to EIA	\$ 173870.85
Company Name	AIG ▼
Product Name	Emerging Edge ▼
Crediting Method	EE100 - Point to Point, SP500 w/100% PR ▼
Historical Period	Last 10 Years ▼

[EIA Profile Rating](#) [Create Income Plan](#)



## About EIAAnalyst2007-Lite

EIAAnalyst2007-Lite does several jobs. First, it allows agents to run simple historical hypotheticals that compare EIA products credit method performance. Second, it includes EIA Credit Method Ratings (our proprietary “Grade” system) on top products. Third, it prepares annual withdrawal income plans using an equity indexed annuity.

The internet form is easy to complete using drop-down selections from our database of over 700 product configurations, and allows for analysis over an array pre-set historical time periods.



# EIAAnalyst2007 Lite™

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**Part1. Set up your comparison scenario**

Select first item to compare

Company or Item: Lincoln Benefit

Product or Item: Savers Index Annuity I

Credit Method: SAVph - Point to Point, SP500 w/100% par

Select second item to compare

Company or Item: Stock/Fixed Indexes

Product or Item: Fixed Rates


Credit Method: Fxd5% - Fixed Interest Rate of 5%

Select scenario details

Ending Dates are Dec. 31st. Data through 12/31/2006

Historical Period: Last 20 years

Initial Premium: \$ 375000

Simple Report    7-Page Report 


(Please click the appropriate button only once, and then watch the progress bar on your browser.)

**Part2. Set up advanced scenario (withdrawals)**

Client's Name: Sample Client and Spouse

Annual withdrawal: \$ 13500

COLA adjustment: 2%

Advanced Report 

(Please click the build button only once, and then watch the progress bar on your browser.)