

13a. START4: Books and Records (full width) & Investment Preferences Tables

Books and Records(full width) & Investment Preferences Tables

These are examples of Books and Records (full width) & Investment Preferences tables, which includes several different approaches determined by content.

Books and Records (full width)

Please review the information on your books and records screen and confirm the contents or make the appropriate corrections as needed. It includes important information, including information about your financial needs and objectives needed to provide you with sound financial advice. It is important that this information be accurately maintained in order to ensure you continue to receive the appropriate recommendations to meet your individual financial needs.

Policy #	Name	Joint Owner	Last Updated
Variable Life Accounts			
32023740045	Flexible Premium Non-Par JSVUL(98)	Sue B. Smith	04/10/2012
60001264	Flexible Premium VGSP	Sue B. Smith	05/12/2013
611111264	JSVUL(98)_Non-Par_GEN	John Smith, Sue B. Smith, Jeremy Smith	04/10/2012
2374004444	MetLife/VLAccum_SerIII_MIC	John Smith, Sue B. Smith, Jeremy Smith	07/01/2011
Annuitant(s)			
123456789	American Forerunner Series (AFS) (NEF)	Jeremy Smith, Larry Heart	04/09/2014
98765443	Flexible Premium Non-Par JSVUL(98)	Jeremy Smith, Sue B. Smith, Jeremy Smith	04/09/2014
12345678943	American Forerunner Series	Jeremy Smith, Sue B. Smith, Jeremy Smith	04/09/2014
Broker Dealer & EGA Accounts			
123456789	Mutual Funds	John Smith	05/12/2013

Investment Preferences (Life Table)

Investment Preferences

Choose your Investment Objective, Risk Tolerance for this account.

Investment Objective	Risk Tolerance
Growth	Moderate

Investment Preferences (Review)

Investment Preferences Edit

Fund Name	Investment Objective	Risk Tolerance
Boston Common Asset Management, LLC.	Growth	Moderate

Investment Preferences (Fund name/3 col)

Investment Preferences

Choose your Investment Objective, Risk Tolerance and Time Horizon for this account.

Investment Objective	Risk Tolerance	Time Horizon
Capital Preserva...	Conservative to...	Intermediate Te...

Do you anticipate making a withdrawal, other than pursuant to a systematic withdrawal plan, before you attain age 59½ years?

Yes No

13a. START4: Prior Investment Experience & Current Holdings Tables, Steps

Prior Investment Experience and Current Holdings Tables, Steps, Review Page

These are examples of Prior Investment Experience and Current Holdings tables in the **Modify & Review** states. (table display determined by content). Steps and Review page with Highlighted field.

Modify state

Review state

Review Page

Steps