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Why Use the Book of Business Download?

It makes finding information about your clients' in-force policies super easy, so you'll be more informed about your clients' coverages and be positioned to help answer any questions about their policies.

• Hover over the Reports tab at the top of the screen, and click on the Book of Business Download link

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\*Prescription drug plan and Mutual Income Solutions<sup>SM</sup> are not included in the download. We are working to add these products to the Book of Business download at a later date.

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- 6. Click the Download CSV for Excel button
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