InforcePRO for Universal Life

Policy Management that Raises the Bar

InforcePRO is web-based product that automates and simplifies the way life insurance professionals manage their in-force book of business. It is used by agents, brokers and advisors across the US and Canada to assess and manage all in-force policies in their books – allowing them to provide greater levels of customer service while saving time *and* uncovering untapped revenue opportunities.

With a click of the mouse, the InforcePRO dashboard centralizes and prioritizes all the in-force policies under management, across all carriers. No calls, no log-ins, no spreadsheets or sticky notes. Just the data you need, when you need it. With InforcePRO you now have the power to raise the bar for your clients, your revenue, and your team.
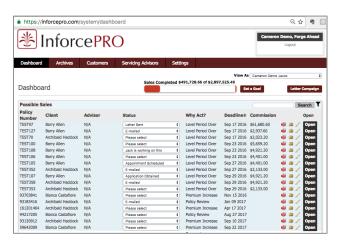
InforcePRO raises the bar for your clients

- Conduct meaningful annual policy reviews without additional overhead by using automatically generated reports & illustrations

- Be alerted to potential policy lapses or the need for increases in premium

- Offer new product options that better serve changing needs with automatically generated reports, illustrations and explanations.

Raising the bar for your revenue

- Use InforcePRO's intelligent analytics to mine existing books of business for dormant opportunities and new revenue

- Identify and manage or absorb/acquire orphan policies

- Calculate the current value of your existing book of business.

Raising the bar for your team

- Free up your team to focus on what's important by automating painful, manual processes

- Prioritize effort towards highest value opportunities flagged by the InforcePRO dashboard

- Access all pertinent information about in-force policies through a single online system

- Minimize risk through proactive policy management and compliance-driven workflows.

InforcePRO's one-stop-shop dashboard

"InforcePRO's new support for Universal Life, coupled with the existing Term Life functionality gives us additional tools to properly monitor our business and establish a true new profit center for our firm."

Alan Grad, Chairman & CEO,
American Business

Call: 888-433-2254 ■ info@inforcepro.com ■ www.inforcepro.com

Supporting Universal Life Insurance

InforcePRO provides in-depth support for Guaranteed Universal Life (GUL) and Current Assumption Universal Life (CAUL) including:

One-Stop-Shop Dashboard - Agents, advisors and brokers maximize efficiency using InforcePRO
- A single, web-based view of all in-force policies managed across supported carriers
- Goal-setting capabilities at both global and policy-specific levels
- Policies prioritized based on needs or size of opportunity, flagging those with greatest urgency.

Universal Life Policy Analysis – No more labor-intensive, manual processes
- InforcePRO's analytics engine compares original policy goals to current carrier illustrations
- Alerts on potential issues such as early lapse or underfunded policies requiring premium increases
- Automated analysis enables agents to health-check client's policies with ease, providing a great opportunity to engage, service and cross-sell.

InforcePRO's
Client-ready Reports

Automatically Generated Reports - Includes 1035 Illustrations, options and revenue opportunities
- InforcePRO automatically calculates and generates a client-ready report that summarizes the current policy status, flags potential issues and provides 1035 exchange alternatives
- Illustrations show top alternative products from selected carriers that may better match client goals using 1035 exchanges
- Reports are professionally formatted and ready-to-go including your branding, definition of terms, and a needs analysis questionnaire to help you uncover new requirements or life changes.

Carriers Support by InforcePRO for Universal Life:

AXA - John Hancock - Lincoln Financial - Principal Financial Group - Protective - Transamerica – Voya.
With new carriers are added on a regular basis.

About InforcePRO

InforcePRO is a breakthrough cloud-based life insurance policy management solution that has been developed by insurance and technology experts who are passionate about how technology and data analytics can dramatically raise the bar for the life insurance industry – for policyholders, agents, brokers and carriers. The Austin-based, venture backed start-up is the only post-issue life insurance software company in the market, and has grown to reach and monitor millions of policies for hundreds of distributors, financial institutions, and carriers. By putting policyholders first, InforcePRO is leading an industry to foster more robust and profitable policyholder relationships, while driving game-changing, technology-led efficiencies. www.inforcepro.com