



Technology Today
Empowers the Agency of Tomorrow

	Pages
Technology Solutions	4-9
Logos and Branding	10-15
Domains and Hosting	16-21
E-Mail and Hosting	22-27
Websites	28-34
Agency Management System	35- 45
Comparative Rating	
Personal Lines	47-52
Commercial Lines	53-59
Digital Solutions	60-67
Customer Relationship Management	68-81
Business Phone Solutions	82-88
Back Office Support	89-92
Lead Generation	93-108
Agency Operations	109-137
Cyber Security	
Email Encryption	139-145
Endpoint Security Suites	146-157



Dear Agents,

Insurance Agency Network realizes embracing “*technology solutions*” can be a big move. Technology should be a great liberator. Freeing your organization to push the limits of productivity and innovation. Empowering your people to work anywhere and at any time. Every minute spent managing your technology is time spent away from your customers and growing your business.

Technology has influenced the Insurance Industry at a rapid pace altering the channel and distribution of carrier business and its relationship with Independent Agents. Traditional agent distribution of insurance products and services is poised for “new” additional changes. Independent Agents and their staff must prepare for the technology of the future which embodies simplified processes and procedures for working with insurance carriers, customers and prospects that gets agents and staff out of the business of processing data and answering irrelevant unnecessary questions is now required and necessary. These processes and procedures will enable agents and their staff to work on their business instead of constantly working in their business.

Insurance Agency Network sees tremendous opportunity in the Independent Agency – Company distribution partnership and realizes that the opportunities to be different and succeed have never been greater. Customers and prospects demand instant service. Staff require flexibility. You must embrace technology to build new business models, processes, and systems that ensure longevity in today’s digital world. Only those agents who are willing to change and adapt to the new client demographics and consumer buying habits will survive in the new insurance paradigm.

For Independent Agents to survive, they must meet carriers’, customers’, and prospects’ expectations and still carve out a window of opportunity. Technology is the tool that will enable them to carve out this opportunity and succeed. Transform today to ensure a more competitive and successful tomorrow.

Sincerely,

INSURANCE AGENCY NETWORK

A handwritten signature in black ink that reads "Michael F Haller". The signature is fluid and cursive, with a prominent "M" at the beginning.

Michael F Haller, CIC
Chief Administration Officer

AIDCO Hall of Fame Member



Technology Solutions for Independent Agents

Technology Solutions for Independence

Embracing insurance “***technology solutions***” can be a big move. Technology should be a great liberator. Freeing your organization to push the limits of productivity and innovation. Empowering your people to work anywhere and at any time. Every minute spent managing your technology is time spent away from your customers and growing your business.

Technology has been impacting the insurance industry for decades and, frankly, mostly for the better. What is new is the opportunity that technology is now providing to better connect insurers, agents, and insureds. Today, more agents and brokers than ever are realizing that technology is the most important tool to increase client satisfaction, customer retention and improve agency operations and profitability.

Technology investments have driven improved productivity, loss control and resulted in outstanding profit margin growth for Independent Insurance Agencies. Technological changes happen so quickly that it is hard to keep up, but if you adapt and invest in the technology that your prospects and customers are using now, when changes come—and they will come—you will be ready. It is just as important to invest in your employees as it is to develop your customer relationships. Empower your staff to do their jobs by giving them the right technology and tools.

Vendor Evaluation

New investments in technology do not always go smoothly. When researching and evaluating vendors or partners, **Insurance Agency Network** asks the following questions:

- ✓ Is there potential to customize the platform for our associates?
- ✓ How will they guarantee their applications and processes will fully exchange information with existing systems and provide the benefits they promise?
- ✓ What kind of troubleshooting and support do they provide through the onboarding process, implementation, and normal everyday use and beyond?
- ✓ Is their platform designed to scale as the business grows, without requiring associates to scrap the platform and start over?

Insurance Agency Network endeavors to bring agents, technology, vendors, and companies together in a forum to adopt common approaches to e-commerce strategy and to agent-company work processes using the internet, browser-based systems, and web-based client interaction programs. We know if we take better care of our customers, we will survive, thrive, and prosper. Technology empowers our ability to do this and helps reinvent the local Independent Agency.







THE PT SERVICES GROUP®
NEW PROSPECTS. NEW BUSINESS. SINCE 1992.



NORTHFIELD LEADS, Inc.
The Leaders In Commercial Insurance Lead Generation





virtru

proofpoint™

/// PAUBOX

Malwarebytes



proofpoint™

appriver®
a zix company

WEBROOT®



It all starts with a
Logo



Kick start your business with good branding & design.

TAILOR BRANDS is a free logo maker. You can create your own logo for free and only pay if you love your finished logo design. Our online logo creator helps small business owners, freelancers, start-ups, and entrepreneurs make a logo design that's both high quality and professional.

Design a Unique Insurance Logo

If you want your insurance company to instantly attract clients, a well-designed insurance logo is your best bet. As your clients are putting their assets, and even their lives in your hands, you'll need to come off as a dependable and trustworthy firm that can properly take care of them.

Do you already have an idea of the type of logo you want to design? If not, don't worry; **TAILOR BRANDS** has gathered a selection of insurance logos representing companies of all shapes and sizes, so you can get some inspiration. When you're ready to get designing, scroll down for best practices to see which logo elements will most resonate with customers in your industry.

Insurance Logo Design Tips



Icons - Not all insurance logos have an icon, although you may decide to use one that expresses something about your brand. Consider looking for an icon that symbolizes property, family, health, life or other depending on the type of insurance you offer.



Typography - What message do you want to send to your audience? Choose a font that expresses that message, whether a bold sans-serif for "dependable" or an italic serif for "progressive". Bear in mind that any typeface you choose needs to be easily legible and complementary to the other elements of your logo.



Color Palette - As insurance can be a tense subject for people, you'll want to choose a color palette that keeps things light and reassuring. Try going with a yellow and blue combination for a positive feel. Switch it up to separate yourself from competitors and put a unique spin on your design.



Layout - The best logo layout for your brand is the one that fits several mediums, like pamphlets, brochures, and business cards. You'll also want to resize your logo to fit your business website, so make sure your layout is versatile and looks great in multiple sizes.

TAILOR BRANDS AI platform makes it ridiculously easy to create a unique online brand identity in minutes and with zero design experience. Make a Logo today and join millions of Businesses that use Tailor Brands Logo Maker

Let's Do Great Things Together!

www.tailorbrands.com



Create a Logo in Just a Couple of Clicks!

Logaster is an online brand identity builder that has helped 10 million small businesses with a fast, simple, and affordable branding solution! Logaster helps small business owners and startups create professional logo designs, even if they have limited funds and zero skills. With their service, besides a high-quality logo, you can design ready-made covers for social networks, business cards, and letterheads.



THOUSANDS OF ICONS AND FONTS - We have an enormous database of icons, fonts, and graphic elements, all for you to browse for your logo design.



SAVE YOUR TIME AND MONEY ON A DESIGNER - With Logaster, you can create your own logo, download files for your website, create social media branding, print, and more. Logaster is faster, cheaper, and more easily to use than anyone else!



FREE LOGO INCLUDED - Download a free small-sized logo without watermarks in PNG format at any time for preview and testing.



ONE TOOL FOR ALL YOUR BRANDING NEEDS - Just choose the logo design you like and let Logaster handle the rest. You'll get your business card, letterhead, favicon, and social media branding designs ready in no time.



CHANGE YOUR DESIGNS ANYTIME - You can make changes to your design even after you download it. Be inspired anywhere, anytime!



COPYRIGHT - You get all the rights to register a trademark and to use your design for commercial and personal purposes.

Choose a Package That's Right for You.

What's included?	XS	S	M	L
	Raster Logo on White Background	Full Logo Package	Package S + Business Card + Social Branding	Everything from Package M + Letterhead, Email Signature, Brandbook
	\$19.99	\$49.99	\$64.99	\$89.99
Logo	For web only	Logo for web and print	Logo for web and print	Logo for web and print
Background & Color Variations	1	5	5	5
Logo Layouts	1	6	6	6
Social Media Kit	No	No	Yes	Yes
Stationary	No	No	Partial	Partial
Digital	No	No	No	Partial
Brand Book	No	No	Partial	Partial
Edit & Download	Full	Full	Full	Full
Total Files	1	120+	180+	200+

Create your own logo in minutes!

www.logaster.com



Logo designs that complement your Brand Experience

LogoLadz is a full-service digital agency with hands-on experience in crafting mind-boggling logo designs to represent a sustainable and credible identity of your brand. You can't make your brand standout without having an astounding logo – a logo that can speak volumes and accentuates your brand's personal touch so that more people get attracted, and they have a reason to trust your brand identity.

Work methodology that guarantees client satisfaction



Client-Centric Strategy - At **LogoLadz**, client-centricity is what matters the most. Therefore, we listen to our valuable clients, understand their preferences, and come up with a foolproof strategy to go beyond their expectations.



Design - Once the strategy is created, we dedicate a respective team to initiate the design phase and incorporate specifications provided by the client.



Result - It is the stage where our perfect execution helps clients meet goals for sustainable growth and stability of their business.

Providing premium services in economical packages

Have you heard of any digital agency offering its premium digital services in economical packages? Only **LogoLadz** does that because they want you to take your business to the sky.

BASIC LOGO DIAMOND LOGO INFINITE LOGO

\$39.00

- 2 Logo Concepts
- 5 Revision Rounds
- 4 File Formats
- 24-48 turnaround time
- 1 Dedicated Designer
- 24/7 Customer Support
- 100% Satisfaction Guaranteed
- Dedicated Account Manager
- Money Back Guarantee

\$99.00

- Unlimited Logo Concepts
- Unlimited Revision Rounds
- 4 File Formats
- 24-48 turnaround time
- 4 Dedicated Designers
- Free Unlimited Color Options
- Business Card Design
- Letterhead Design
- Invoice Design
- Free 2 Email Signatures
- 24/7 Customer Support
- 100% Satisfaction Guaranteed
- Dedicated Account Manager
- Money Back Guarantee

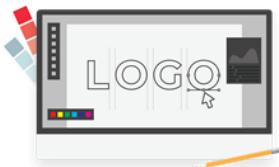
\$199.99

- Unlimited Original Logo Concepts
- Unlimited Revision Rounds
- 4 File Formats
- 24-48 turnaround time
- 8 Dedicated Award-winning Designers
- Free Unlimited Color Options
- Social Media Designs
- With Grey Scale Format
- Free Icon Design
- Free Stationary Designs
- Email Signature Designs
- Flyer/Brochure Designs
- 24/7 Customer Support
- 100% Satisfaction Guaranteed
- Dedicated Account Manager
- Money Back Guarantee

Reach your goals effectively. So what are you waiting for?

www.logolandz.com

Design your Insurance Logo.



It all starts with a high-quality logo design. Make an impression with high-quality, insurance agency logo designs. Your logo grabs attention, makes a strong first impression, is the foundation of your brand identity, is memorable, separates you from competition, fosters brand loyalty, and is expected by your audience.

Insurance Agency Logos Matter. Why?



A well-designed logo for your insurance business grabs your audience's attention- You have about **eight seconds to engage consumers' attention**, so your logo has to do a lot of work in a short amount of time. You need to create an eye-catching logo that helps your brand stand out from the competition.



Your insurance agency logo design is your agency's one shot at making a strong first impression - An agency logo is how you introduce your brand to a new audience. You want that first impression to pique consumers' interest and entice them to learn more and help you make that all-important first impression count.



Insurance company logos are the foundation for agency marketing - Your logo will be on letterheads, business cards, landing pages, email campaigns, and other marketing elements. From the overall design to colors and fonts, your logo serves as a foundation for your brand story.



Your agency logo fosters brand loyalty - Consumers crave consistency. As your brand grows, your logo will become familiar to a wide range of consumers. This familiarity creates trust and easy access to your products and services.

Trusted Brands Begin with Beautiful Logos

Establishing your insurance agency's brand identity all starts with a logo. Agency Revolution offers logo design services if you're starting from scratch or have an existing logo that needs sprucing up. Which option is right for you?



Brand New Logo - \$800 - Do you need to start from scratch? No problem. They will help you create a logo you love.



Logo Refresh - \$600 - If your logo feels tired, so does your brand. Updating a logo can announce a new phase for a business.



Anniversary Logo - \$500 - Did your agency reach a big milestone? Incorporate it into a logo to communicate experience.



Logo Clean-up - \$300 - Like your logo but missing the source file? They will recreate it and deliver a high-resolution version to use anywhere, even print.

The Tools You Need to Build the Agency You Want

IAN Associate Logo Samples that send “A Message”.





Domains

the gateway for customers to reach you



GoDaddy helps small business owners succeed.

GoDaddy offers everything you need to create an effective, memorable online presence. GoDaddy is the world's largest and trusted domain registrar that empowers people like you with creative ideas to succeed online. [Buying a domain name](#) is easy with a domain search tool and domain name generator tools so you can find the perfect website address for your business.

So what all do you get?

- ✓ Simple domain set up. You do not need any technical skills.
- ✓ Up to 100 subdomains create a custom web address.
- ✓ Real-time monitoring to make sure you are always up and running.
- ✓ Quick, simple tools to forward your domains to any existing website.
- ✓ World-class support from our web pros standing by ready to assist.

Why choose GoDaddy?

With 20 million customers, 80+ million domains under management in 58 countries, GoDaddy has more experience than anyone and will make sure you find the right domain and that it has a secure home online.



Your one-stop tech shop - Forget about jumping around the internet to get all the tools you need to succeed online. Find everything for your online presence in one place.



Widest selection on the web - Every time you enter a name in our domain search box, our powerful engine searches the web's largest pool of names. There is no better place to find the right domain name for your business.



The technology you need - GoDaddy offers tools for nearly any online endeavor, from websites to email marketing. Best of all, our cloud technology is easy to use — and afford.



Award-winning support - If you have a question about a domain name (or anything else that we offer) our web pros are standing by, ready to pick up the phone and help.



A worldwide community - A place where 20 million individuals from 58 countries can exchange ideas about conquering the internet.

Keep your domain locked & in your name

Business Protection:

- Domain names are safe for up to 12 months.
- Blocks both accidental and malicious domain transfers.
- Keeps your personal details hidden from snoops and crooks.
- Publishes an online business card so customers and partners can find you.

Make your own way.

www.godaddy.com



Helping you get online faster

Dotster provides web hosting solutions and technology to successful individuals, entrepreneurs and small-and medium-sized business around the globe. They have grown, since the founding in 1998, to be one of the largest web hosting and domain name providers, powering more than 1.2 million websites around the globe. They specialize in affordable domain names, web hosting, Email, SSL certificates, web design, and online marketing services. Free domain services including URL Forwarding, Email Forwarding, Transfer Lock, and Total DNS Management, give customers comprehensive control over their domain portfolios.

Dotster pride themselves on listening to customers, truly understanding the technology challenges, and helping people, like you, move forward, achieve your goals, and share your ideas online with the world. No matter what the level of technology required, they will find an answer. But not just any old answer. They offer sage advice that is simple, reliable and works for you.

Get a Domain Name



Start your next domain name search - Buy a domain name while choosing from all of the most popular top - level domains (TLDs) and over 25 country code top level domains (ccTLDs). Check domain availability and get a domain today.

Save Money



Do not break the bank - Certain domain name registrations are as low as just \$2.99 per year. With our affordable pricing and superior support, there is no reason to overpay when buying a domain name.

Domain registration benefits

Every domain name registration includes many additional features, including:

- ✓ **Let us encrypt™** - Secure your website with Let us Encrypt™ Free SSL.
- ✓ **Email Forwarding** - Automatically forward email addresses under your domain to any other valid email address.
- ✓ **DNS Management** - Retain total control over the DNS for the life of your domain name registration.
- ✓ **Transfer Lock** - Protect your domain from any unauthorized transfer, or "hijack."



Find your place Online

Let the world know what you are all about before they even reach your website. Express yourself with a descriptive domain ending that helps your business stand out. **Google Domains®** makes the process of getting a domain as simple & transparent as possible.

Powerful. Simple. Straightforward.

Discover Google Domains



Added value at no added cost - Domains start at \$9/year, with privacy protection, 24/7 customer support, and ICANN fees included.

The easy way to look like a pro - Create a modern website with one of their websites builders' partners and add custom email from G Suite.

Get Google reliability - Experience speed and security using DNS servers that run on Google infrastructure.

Why Google Domains

Quality, meets reliability

Put the power of Google behind your online presence



- Discover the perfect name with Google Domains Search and Suggestions and your pick of hundreds of domain name endings
- Experience speed and security using DNS servers that run on Google infrastructure
- Gain access to professional tools like Dynamic DNS, Google Synthetic Records, TTL configuration, and more

More professional. Less complicated.



The tools and partners to help you build your online presence like a pro

- Create an easy-to-build, modern website with one of our trusted partners
- Upgrade to a credible, professional email that matches your new domain
- Design as many sites as you need with up to 100 sub-domains
- Receive email for up to 100 alias email addresses, with email forwarding

Added value. No added cost.



Get everything you need, for one price. No added surprises or expenses.

- Protect yourself from spam and identity abuse with privacy protection
- Safeguard your domain from potential attacks like DNS spoofing with free, one-click DNSSEC
- Add another layer of protection with Google 2-Step Verification
- Favorite domains you are not quite ready to buy and share them with clients or friends for feedback.



Together, Online

Bluehost is a leading web hosting solutions company. Since their founding in 2003, Bluehost has continually innovated new ways to deliver on their mission: to empower people to fully harness the web. They provide comprehensive tools to millions of users throughout the world so anyone, novice, or pro, can get on the web and thrive with our web hosting packages.

Bluehost domain manager makes it easy to track, update, transfer, purchase, and administer all of your domains in one place. Plus and Business Pro accounts support unlimited add-on and parked domains, subdomains, and even domestic and international domains.

Each Domain Includes



Easy Management - Once you use the domain name lookup and find a suitable web address, you can manage your site through a simple interface. Manage your domain and all of its aspects from an easy-to-use control panel. Change DNS records easily across multiple domains.



Auto-Renewal - Protect your domain from expiring and accidentally being lost by enabling auto-renewal. Switch back to manual renewal at any time. Using this service ensures that your website domain names are always protected.



Domain Lock - Once you find your perfect domain, lock it down to prevent unauthorized transfers. Unlock it for transfers at any time. Our domain name service will save your preferred name and keep it secure for when you are ready.

24/7 Expert Support

Bluehost expert team is always on hand to help answer your questions, get you started, and grow your presence online. You can call, chat or email at any time!

www.bluehost.com

Domain Names



	Set Up Fees <i>No Charge</i> \$12.17	Set Up Fees <i>No Charge</i> \$9.99	Set Up Fees <i>No Charge</i> \$12.00	Set Up Fees <i>No Charge</i> \$12.99
Nationwide Co Op Contract Required	<i>No Annual</i>	<i>No Annual</i>	<i>No Annual</i>	<i>No Annual</i>
<i>Features:</i>				
Domain Registration	X	X	X	X
Domain Extensions	X	X	X	X
Domain Privacy Protection	X	X	X	X
Domain Lock & Auto Renewal	X	X	X	X
Domain Backorders	X	X	X	X
Domain Broker	X	X	X	X
Domain Value Appraisal	X	X	X	X
Personal Domains	X	X	X	X
Domain Transfer	X	X	X	X
Secure with SSL Certificate	X	X	X	X
Email Storage	X	X	X	X

Pricing and features as indicated are believed to be true and correct via current information obtained from the internet and are subject to change without notification.



Email

Is not going away anytime soon



INTERMEDIA

Go beyond business email with Intermedia

For most businesses, choosing the email and business productivity applications for your staff is the easy part. Microsoft® Office®, Exchange Email, and Office 365® are trusted and feature-rich choices. But selecting the right plan can be confusing.

Exchange Email is only the beginning...

Intermedia will help you decide which plan and combination of options is right for your business, whether you need Exchange Email, Email and Microsoft Office applications, compliance and security options, or enhanced versions of Office 365.

-  PC Magazine Editors' Choice Exchange Email with 99.999% SLA and J.D. Power-certified support.
-  Microsoft 365 Apps (Word, Excel®, PowerPoint®, Outlook®).
-  Comprehensive compliance and security capabilities including Archiving and Encryption.
-  Customized deployment options for single tenant environments (500+ users).
-  Expert migration and onboarding included free of charge.

The Plus in Email Plus

Email is the centerpiece, but it does not stand alone. Intermedia offers solutions that bring added functionality to Hosted Exchange Email to meet the unique needs of your business, whether you're seeking to comply with HIPAA, FINRA, GDPR or other regulations, or you are looking to boost employee productivity with better tools. Choose the combination of services that is right for your organization.



Flexible deployment options make it easy for you to get the right solution for your business today while also being able to add on more services, devices, and users as your business grows in the future.

www.intermedia.net



Microsoft 365 | Business

Microsoft 365® is the productivity cloud that brings together best-in-class Office apps with powerful cloud services, device management, and advanced security.

Be more productive wherever you are - Connect employees to the people, information, and content they need to improve productivity and transform collaboration.



Includes Office apps - Stay up to date on any device with the latest versions of Word, Excel, PowerPoint, and more.



Email and calendaring - Connect with customers and coworkers using Outlook and Exchange.



Chat, calls, and meetings - Keep your team on the same page with chat, online meetings, and calling in Microsoft Teams.



Cloud storage - Manage your files from anywhere with 1 TB of OneDrive storage.

Do not drown in paperwork - Transform the way you manage your business and simplify the way work gets done with modern tools that streamline business processes.



Reduce manual paperwork - Digitize manual and repetitive paper-based forms with Microsoft Forms.



Captured insights - Create surveys, polls, and questionnaires to gather data and insights from employees and customers.



Make repetitive tasks easy - Automate everyday business processes with Power Automate.



Works with the apps you already have - Access all your tools in one place with third-party app integrations in Microsoft Teams.

Protect what matters most - Help safeguard your employees, data, and customer information with enterprise-grade security you can trust.



Defend against cyberthreats - Protect against viruses, malware, phishing attempts, ransomware, spam, and other threats.



Keep customer data safe - Protect information from cybercriminals, unauthorized access, and accidental deletion.



Secure your device - Help keep your data safe, even when accessed on employees' personal devices.



Simplified IT management - Easily set up and manage users, devices, and data so you can focus on running your business.



Show them you mean business

GoDaddy™ has evolved into a mature and flexible web hosting provider that offers a slew of tools and services to help satisfy most website needs. They are empowering entrepreneurs to change the world if it does not quite fit them, to make their idea real, to grow it online and help them do what they have been dreaming of and make the world they want.

Professional Email

- Potential customers are **almost ten times** more likely to choose you over other businesses when you have a professional-looking email address.
- **75% of customers also say it is extremely important** when an email address matches the name of the business.
- When you attach your business name to the likes of `@gmail.com` or `@yahoo.com`, **you are advertising their company, not yours**.
- With Professional Email, every time you send `@yourbusiness.com` emails, **you are getting your business name and website out there**.

Get GoDaddy Professional Email and you will...



Look professional - A professional email address like `Lily@LilysBikes.com` makes your business look more stable, trustworthy, and credible than a generic (and clunky) free email address. And that adds up to more customers and increased revenue.



Be organized. Stay organized – Use of the Internet Message Access Protocol (IMAP), means that all of your email is saved on your Internet Service Provider's servers, so it synchronizes between all your devices. Plus, it works with Outlook, Apple Mail, Thunderbird, and more.



Work in style - Sleek, clean, modern designs with integrated calendars, contacts, and customizable web portal, will actually make you look forward to getting to work.



Stay safe and secure - You do not want spam and unwanted, potentially dangerous email to reach your inbox. Neither does GoDaddy. Our best-in-class security filters stops it dead in its tracks.

What makes GoDaddy the #1 web host?



Award-winning support - Seven-time winners of the "Exceptional Customer Service" Stevie® Award and taking your calls 24/7/365.



The vision for our mission – GoDaddy has helped 20 million people make their own way online. You can trust us to do the same for you.



All in one place - Launch, manage and grow your online presence – from your .com to your SSL – from one single, convenient place.

GoDaddy has a plan for every business or budget

Email Essentials, Online Essentials, or Business Premium

Make your own way.

www.godaddy.com

Google Workspace

Everything you need to get anything done, now in one place.

Google Workspace can help you get more done with business productivity and collaboration tools loved by billions of users. Work faster, smarter, and more collaboratively than ever before.

- **Tools you love, thoughtfully connected** - An integrated workspace that's simple to use, Google Workspace lets you spend less time managing your work and more time actually doing it.
- **Smart suggestions to help you prioritize** - Address what's important and let Google handle the rest with best-in-class AI and search technology that helps you work smarter.
- **Flexible solutions for every business** - Work from anywhere, on any device – even offline – with tools to help you integrate, customize, and extend Google Workspace to meet your team's unique needs.

Get Gmail, Calendar, Drive, Docs, Meet and more for business.



Gmail - Secure business email, and so much more - The latest Gmail makes it easier to stay on top of the work that matters. With secure, ad-free email as a foundation, you can also chat, make voice, or video calls, and stay on top of project work with shared files and tasks — all right in Gmail.



Calendar - Integrated online calendars designed for teams - Spend less time planning and more time doing with shareable calendars that integrate seamlessly with [Gmail](#), [Drive](#), Contacts, [Sites](#) and [Meet](#) so you always know what's next.



Drive - Store, access, and share your files in one secure place - Store any and every file. Access files anytime, anywhere from your desktop and mobile devices. Control how files are shared.



Docs - Word processing for teams - Create and edit text documents right in your browser—no dedicated software required. Multiple people can work at the same time, and every change is saved automatically.



Meet - Secure video meetings for teams and businesses - Help your team stay securely connected with enterprise-grade video conferencing built on Google's robust and secure global infrastructure.

Transforming how enterprises work.

Become one of the five million teams that depend on cloud-based apps like Gmail, Calendar, Drive, Docs and Meet to get things done. **Google** Workspace plans provide a custom email for your business and includes collaboration tools like Gmail, Calendar, Meet, Chat, Drive, Docs, Sheets, Slides, Forms, Sites, and more.

Ready to get started?

www.workspace.google.com

Email Hosting



Office 365

GoDaddy

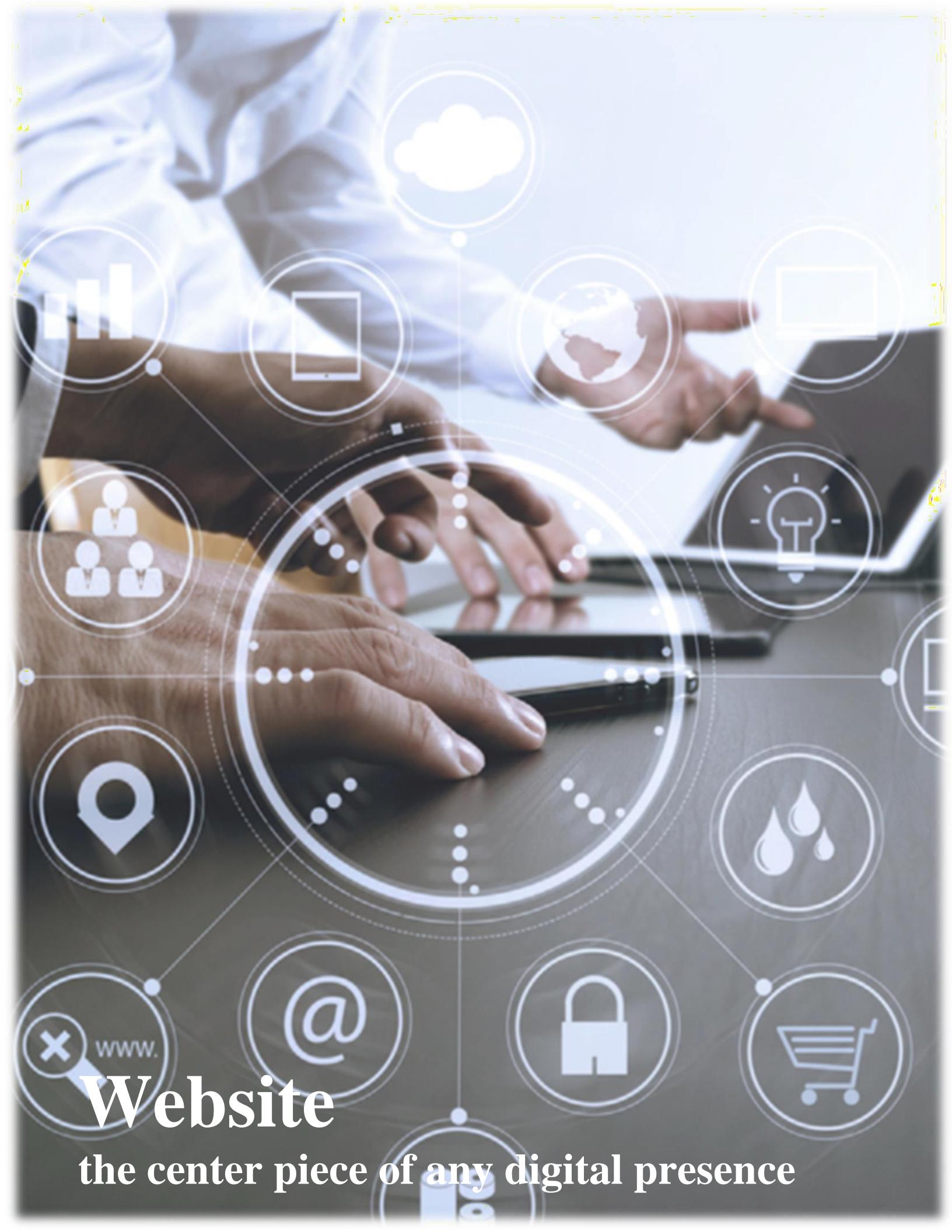
Google Workspace

Set Up Fees	No Charge	No Charge	No Charge	No Charge
Monthly Fee Per User	\$14.99	\$12.50	\$12.99	\$12.00
Plan Type	Enterprise	Premium	Deluxe	Business
Nationwide Co Op	No	No	No	No
Contract Required	Annual	Annual	Annual	Annual

Email Hosting Features

Starting Storage	Unlimited	1TB	1TB	Unlimited
Custom Signatures	X	X		X
Mobile Apps		X	X	X
Calendar	X	X	X	X
Client Chat	X	X	X	X
Collaboration Tools	X	X	X	X
Integration API	X	X	X	X
Encryption and Malware scanning	X	X	X	X
Email Rules/Filters	X	X	X	X
Anti-Spam Filters	X	X	X	X
Anti- Phishing Filters	X	X	X	X
SOC2 audited security controls	X			
Full Exchange Compatibility	X	X	X	
Active Directory	X	X	X	X
POP3 Compatibility	X	X	X	X
IMAP Compatibility	X	X	X	X
Uptime Guarantee	X	X	X	X
Compliance-HIPAA, FINRA & others	X	X	X	X
Native Email Encryption	X	X		
Canned Responses		X	X	X
Fully certified support experts	X			
24/7 Phone Support	X	X	X	X
Office 365 Apps FREE with select plans		<i>Included</i>	<i>Included</i>	<i>Included</i>

Pricing and features as indicated are believed to be true and correct via current information obtained from the internet and are subject to change without notification.



Website

the center piece of any digital presence



A Website is the online face of your agency.

InsuranceSplash® is the #1 Insurance Marketing Website for Agents. It is the most important part of your online marketing strategy and the first thing people see when they look you up. Most of your clients, prospects, and others you connect with daily will visit your website before ever interacting with you or your staff.

Here is what you get with InsuranceSplash



An Amazing Insurance Agency Website

Clean & modern designs that are highly customizable

Build the site for you and make updates if you want them to

Easy drag-and-drop backend system to update site yourself

[Click Here to Learn More About Our Insurance Websites](#)



Search Engine Optimization

Setup, manage and optimize all important online business listings

On-Site original content creation and publication (original blog articles)

Off-Site content publication for linkbuilding (videos, press releases, etc.)

[Click Here to Learn More About Search Engine Optimization](#)



Social Media Management

Professional branding design layout for all your agency profiles

Updates made on your agency's behalf each week

Facebook, LinkedIn, Twitter, Google+, and more social networks

[Click Here to Learn More About Social Media](#)



Email Newsletters

Monthly Email with all your online content for the month

We will send it to you to send or we will send up to 2,500 contacts for you

Add subscribers through your website and other social channels

Generate leads, referrals, cross-sales and improve retention



Online Marketing Dashboard

Dashboard tracking of traffic, clicks, rankings, opens and more

See the results of our marketing efforts in real-time 24/7

Monitor your search engine rankings, website traffic, and advertising

Keep track of what is working and not working on social media



Customer Support

24/7 Website support system so you can request help from us at any time

Phone support during regular office hours if you need to discuss something

Online tutorials for the most common website edits so you can do it yourself

3 Hours/month of website customizations so you do not have to do anything.

The Setup & Launch Process Couldn't Be Easier



Fill out a Form
5 Minutes



Your Site Built
2 Business days



Your Site Adjusted
Whatever you need



Pay & Launch
When you are Ready

InsuranceSplash makes everything easy.

www.insurancesplash.com



AGENCY REVOLUTION

Your Digital Marketing Hub

Agency Revolution® provides modern websites and marketing tools to attract leads that grow your insurance agency. The foundation for growing your insurance agency with digital marketing is a beautiful modern website. Built for SEO and designed to attract leads, Agency Revolution's custom websites make your insurance agency look polished and professional. Add powerful, intuitive email and social media marketing tools and a library of informative insurance content to take your marketing campaigns to the next level.

Grow Referrals & Attract Leads

A website is a requirement for business, but do you know how to grow your insurance agency and drive more web traffic? With a ton of articles, presentations and infographics for your insurance customers and prospects, you will have a wealth of content to use in your marketing campaigns to attract leads you can convert to customers.



Automated Marketing - Nurture leads, generate referrals, and stay in touch automatically. Automated campaigns deliver a stream of relevant content that you control to your clients and prospects.



Custom Emails – Do not pay for another service just to send professionally branded emails to your contacts. Our custom email builder makes communicating fast and easy.



Social Scheduling - A social presence is essential to your marketing. We help with prewritten social posts and other content designed to attract and convert.

Content & Campaigns

Have you thought about how to grow your insurance business with great content? Generate more leads by adding top-quality videos, infographics, articles, quizzes, or e-books to your website and your marketing campaigns. Visitors get a fun, informative experience, and you get their contact info to follow up.

Video of the Month - An informative video on a topic that simplifies the complex in an entertaining format and establishes you as a knowledgeable guide.

Social Foundations - Establish a consistent, foundational presence on LinkedIn, Facebook, and Twitter with automated social posts.

Holiday Greetings - Let your clients and prospects know you are thinking of them all year long, with fun-filled greetings sent on multiple major holidays.

Referral Ready – They will send periodic emails to your clients so you do not have to and will even offer and deliver a free gift in exchange for their referral.

Customize Your Website

Whether you need to get a simple site off the ground right away or a tailored design with guidance from a pro, they have got you covered. Choose the design service that is right for you.

- **Standout** - The fastest, least expensive way to get a great website up and running.
- **Connect** - Work with a specialist to customize your homepage.
- **Attract** - Choose from limited edition themes and work with a Success Coordinator

The Tools You Need to Build the Agency You Want

www.agencyrevolution.com



Powerful online marketing to drive profitable growth

ITC® Insurance Website Builder provides more websites for insurance agencies in the United States than any other website provider. They help independent insurance agents and brokers, and their partner carriers succeed in the modern competitive market. Together or individually, each of their products and services can improve your agency's efficiency.

Why Insurance Website Builder?

Insurance website experts know insurance website design, so you get a strong online presence. A good website will give your agency authority and legitimacy online. If you want a quality insurance website design to make a good impression, you need Insurance Website Builder.

Need more reasons to choose Insurance Website Builder?

- ✓ *Flexible plan options for any budget*
- ✓ *No contracts*
- ✓ *Professional insurance website designs*
- ✓ *Website in as few as 14 business days.*
- ✓ *Lead generating quote forms*
- ✓ *Customer service forms*
- ✓ *Search engine friendly*
- ✓ *Mobile website included*

How Does Insurance Website Builder Work?

You do not have to have design experience or knowledge to get a great website. You can have a professional looking insurance agency website. Over the years and after many websites (more than 4,000 and counting), ITC® has perfected our insurance website design process. This means you can go from an idea to a live website in 14 business days.

What is the process? Here is a short overview.

1. Choose your insurance website template.
2. A consultation with a website coordinator, during which you will discuss your design requirements and customization to your website template.
3. Design personalized graphics specifically for your insurance agency website.
4. Build your website.
5. Review your proof website from your coordinator.
6. If you wish to modify the design, request your changes. These will go back through design and setup.
7. Approve your insurance website design, and your new insurance agency website is live.

More than a website

Insurance Website Builder is part of a Whole Agency Marketing plan. With the whole agency marketing plan, ITC® will review your marketing plan and provide an assessment of your existing marketing efforts. They will also make recommendations on how to improve your offline and online marketing. The goal of the whole agency marketing plan is to make your agency visible, get your agency noticed, and keep your agency connected.

One Company. One Goal. Yours.

www.getitc.com



Solutions for Insurance Agents

BrightFire® is one of the leading insurance website design and digital marketing providers in the United States and is committed to providing agencies with customer service they love and solutions that deliver results. BrightFire delivers complete digital marketing solutions tailored for independent insurance agencies of all sizes.

Why a BrightFire website is the right choice for insurance agents.



Insurance Agency Websites - A website with everything your agency needs to attract and convert insurance buyers online.

- Web designers work closely with you to capture your vision.
- Sales tools built for insurance agents to engage and close deals.
- Provides helpful insurance blog content so you do not have to.



Reviews & Reputation Management - Grow, nurture, and protect your agency's online reputation.

- Continuously works to get reviews from your policyholders.
- Climb to the top of Mt. Google.



Local Listings Management - Get found across the web so consumers can reach your agency.

- Establish your brand – everywhere.
- Consistency is your best friend.



Social Media Marketing - Tell your story and build relationships with social media management.

- What is your relationship status with your customers?
- Cast a wider net. Pull in more prospects.
- Get a bird's eye view of all your social interactions.



Pay-Per-Click Advertising - Match the products you want to sell with insurance buyers in targeted geographic areas.

- Jumpstart your sales pipeline in a matter of days.
- Even your independent agency can compete, and win.
- Stay on top of the latest industry trends, changes, and best practices.
- Stay top of mind even if they are not ready to buy today.

Integrate marketing and technology tools with your BrightFire website.



BrightFire's website and digital marketing platform integrates with numerous marketing, quoting, and customer support services used by insurance agencies. With these integrations, your agency can automate tasks and sell more efficiently. Connect tools you already use or discover new ways to streamline your agency.

Partner with BrightFire today and get found!

www.brightfire.com

FORGE3

The website solution for insurance agencies.

Forge3 is fast growing, slow and steady. They have pioneered the industry's most innovative and powerful sales tools, including Clickable Coverage, Hello Producer, Power Panels, and more. But they are still just getting started designing the website solution for insurance agencies that includes everything you need to compete in today's world.

Look amazing, get found, sell more, and service better.



Look Amazing – The Insurance industry's most impressive websites. ActiveAgency is designed to reflect your agency and maximize conversions. It's like getting a custom, highly-optimized website at a fraction of the cost.

Get Found - 74% of all insurance shoppers start by searching online.



- Search Engine Optimization (SEO)
- 5-Star Review Capture
- Location Pages with Schema
- Local Directory Listings
- Social Media Content / Paid Ads

Sell More - Sales tools like you've never seen before. ActiveAgency is home of the industry's most innovative and proven sales tools. Clickable Coverage, Hello Producer, Video Proposals, Power Panels, and more are all included.



- Clickable Coverage
- Video Proposals
- Hello Producer
- Power Panels
- Lead Capture Forms

Service Better - Exceed client expectations. People expect to be able to engage with you online. Give them what they want.



- 24/7 Client Service Center
- Policy Review Form
- Live Chat Integration
- Notification Bars
- AMS Connection

The industry's best-looking, most feature-packed websites for **\$250 per month** No setup fees. No long-term contracts. You simply sign up and they get to work. It's really that easy.

Everything's included. Just like it should be.

www.forge3.com

Website Builder					
Set Up Fees	<i>No Charge</i>	\$500.00	\$1,750.00	<i>No Charge</i>	<i>No Charge</i>
Monthly Fee	\$299.00	\$289.00	\$299.00	\$270.00	\$250.00
Nationwide Co Op	50%	50%	50%	No	No
Contract Required	<i>No Contract</i>	<i>Annual</i>	<i>Annual</i>	<i>No Contract</i>	<i>No Contract</i>
Customizable/Scalable Websites		X		X	X
Multiple Designs	X	X	X		
Logo Design and Integration		X	X	X	
Online Branding Package	X	X	X	X	X
Compliant - ADA, W3C, PCI & HIPAA	X	X	X		X
Secure with S S L Certificate	X	X	X	X	X
On-Going SEO Optimization	X	X	X	X	X
Google Search & Traffic Search Rankings	X	X			X
Social Media Account Creation	X	X	X	X	X
Live Chat		X		X	X
Facebook, LinkedIn & Google Setup	X	X	X	X	
YouTube Channel Branding	X				X
Local Business Listings Management	X	X	X	X	X
Interactive Call-To-Action Buttons	X	X	X	X	X
Agency Photo Gallery/Staff Directory	X	X	X	X	X
Setup & Optimize Monthly Blogs & Posts	X	X	X	X	X
Agency Monthly Email Newsletter	X	X	X	X	X
Online Document Library	X	X	X	X	X
Webinars/Tutorials Product Pages	X	X		X	X
Customer Management and Contact	X	X	X	X	X
Online Customer Service & Quotes	X	X	X	X	
Forms Online Rater Integration	X	X	X	X	X
Email Marketing	X	X	X	X	X
Referral Campaigns/Google Reviews	X	X	X	X	X
24/7 Client Support	X	X	X	X	X
Dedicated Marketing Coach		X			X
Online Advertising	<i>Added Cost</i>		<i>Added Cost</i>	<i>Added Cost</i>	<i>Added Cost</i>
Online marketing dashboard 24/7	<i>Available</i>		<i>Available</i>	<i>Not Available</i>	<i>Available</i>
Time to Build Your Site	3 days		Varies	14 Days	Varies
					30 days

NOTE: Visit the vendor website for additional features and details.

Pricing and features as indicated are believed to be true and correct via current information obtained from the internet and are subject to change without notification.



Agency Management System

a complete view of customers and prospects



Your agency management system is your most important employee.

Hawksoft® is a leader in management systems for agencies and realizes that the foundation of an Independent Insurance Agency is built on a management system, so you need to choose a worthy one. It affects the two most important functions of your business – retention and sales. Here are some of the things a management system does for your agency.

- Arms you with communication tools to market and build relationships
- Builds history and mitigates E&O by tracking every interaction
- Designs your staff's daily agenda with a system of alerts, reminders, and tasks
- Reports on the health of your business and unmet growth opportunities to take advantage of
- Manages carrier downloads to keep policies updated
- Brings sanity to your workday with a system of procedures and consistent documentation across policyholders and multiple carriers

Why Choose HAWKSOFT®?



#1 in usability - Access all policyholder info and docs in 4 clicks or less! Usability should not take a backseat to functionality. HawkSoft is for those who care about details like reducing the number of steps it takes to complete the actions your agency engages every day.



No contracts - No gimmicky introductory offers - Don't hold your agency hostage to long-term commitments with low introductory offers. These offers mean that your price will skyrocket after the honeymoon is over. Data extraction fees may also be in the fine print. HawkSoft has no contracts.



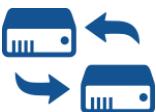
Agency Intelligence™ - All your reports, no additional cost - Instantly access your Book of Business, analyze customer and policy key performance indicators, and dive into actionable reports designed to guide your agency to greater success.



Your data, any device - PC, Android, iPhone, iPad, desktop, or laptop. Always get the full HawkSoft system experience and not just a shell with limited features.



HawkSoft Concierge builds your daily agenda - Never miss an important policy event or follow-up. Start every morning with a list of reminders and tasks. To-do lists for your agency staff are automatically created and placed on their Start Page.



Data conversions without excuses - We transfer more data and docs than any other vendor. Client data, log notes, attachments, accounting, carrier setups, and much more. Work with a Conversions Manager who uses a consultative process. Verify data along the way. We leave out the surprises and excuses.

Complete Accounting Solution

Agencies need tools to manage both trust and operating accounting. **HawkSoft®** offers a complete solution to perform comprehensive accounting tasks by way of a partnership with Intuit **QuickBooks®**, the #1 accounting software for small business. This partnership allows trust and operating accounting to flow seamlessly between both systems, eliminating double entry.

All insurance (trust) accounting is done in HawkSoft. Bank (operating) accounting is done in **QuickBooks®**.



INSURANCE ACCOUNTING (TRUST ACCOUNTING)

Built into HawkSoft's platform.

- Create invoices for customers
- Take payments on invoices
- Receipt customer payments
- Upload payments to carriers websites
- Manage customer receivables
- Review invoice, receipt, customer receivables reports
- Retain commissions, and fees
- Reconcile commissions
- Generate commission paid reports for your agent
- Generate commission paid reports by carrier
- Create and track commissions



BANK ACCOUNTING (OPERATING ACCOUNTING)

- Bank synchronization
- Interactive reports
- Expense tracking and KPI reports
- Direct access to QuickBooks information for CPAs
(agency does not have to pull data)





Maximize your agency's potential with a cloud-based easy-to-use management system.

EZLynx® Agency Management System allows you to maximize your agency's potential by increasing your ability to retain current customers while acquiring new business. As your book of business grows, it becomes increasingly important that your data aids in your daily workflow rather than hinder it. Find all your customer's quotes, policies, and documents in one organized place and easily remarket with up-to-date information that is synced from your daily policy downloads.

Key Benefits



Keep Existing Data - Stop stressing. Data conversion experts will import existing management system information painlessly.



Reduce E&O Exposure - Record everything — automatically. All notes, documents, emails, and tasks are linked to your client's file.



Improve Customer Service - Use sticky notes, tasks, and reminders to streamline your workflow and maximize productivity.



Grow the Business - Reduce time with pre-filled forms and synced carrier information so that you can focus on growing your business.



Track Profits - Accounting tracks premiums and commissions so that you can understand your book and plan for the future.



Agency Automation - Automate task creation and email campaigns based on policy download transactions and other events.

Features

- **Agency Workspace** - An agency collaboration tool that includes, notes, tasks, reminders, and notifications.
- **Agency Pulse** - A monthly analytics report that provides performance metrics to monitor and improve agency health.
- **Policy Sync** - Update a rating application from current policy information at renewal time for fast re-quoting.
- **Policy Compare** - Tool for viewing policy transactions side-by-side comparison to explain premium increases and more.
- **Policy Downloads** - Customer policy data is downloaded to the EZLynx account and automatically matched to existing personal and commercial customers.
- **Commercial Quote Tracking** - Ability to manually record commercial quotes in applicants' EZLynx accounts.
- **Commercial Policy Entry** - Record Commercial policy information based on ACORD standards. Guides agent to ACORD forms needed for each specific line of business.
- **Commercial Application Entry** - Enter application data into EZLynx once in order to automatically create ACORD form.

- **Commercial Proposals** - Automatically create commercial proposals for multiple LOBs to present to prospective customers.
- **Claims** - Record policy claims in customers' EZLynx accounts.
- **Commissions** - A percentage of policy premium that is paid to an agency/agent for selling a policy for a carrier.
- **Document Management** - Ability to manage required insurance documents in an organized and efficient manner in EZLynx.
- **Accounting** - Track commissions earned, owed, and paid for both agency bill and direct bill policies. Keep your premium trust in balance and manage receivables and payables.
- **Retention Center*** - Patented tool using predictive analytics to identify and manage high risk renewals for an agency.
- **Sales Center*** - Pipeline management tool to simplify the supervision and tracking of the sales process.
- **Submission Center**** - Centralize commercial lines submission workflows, obtain product and appetite guidance, and improve commercial submission outcomes with EZLynx Submission Center.

***Sold separately**

****Add On Feature**

EZLynx Management System on Mobile

Get Started with EZLynx Mobile - The EZLynx Mobile dashboard is your hub for staying productive when you are away from the office. Immediately, see where you stand with your upcoming and overdue tasks. Find client details in seconds using the same quick search feature you have come to love in EZLynx desktop; Plus, you will have access to those client's policy details, quotes, activity log, and documents. You can even upload photos right from your camera-equipped mobile device!

Create Notes and Tasks with Ease – You will have convenient access to frequent actions from the applicant overview screen – call, text, email, and even bring up their address on the map! Quickly create notes and tasks for your clients with a few finger swipes. It is easy to assign a note to a user in your agency, set reminders, and keep your tasks organized with labels. You will always know the status of your own tasks from the EZLynx Mobile dashboard.

Fully Integrated with EZLynx Text Messaging - Another exclusive EZLynx feature, integrated text messaging makes it possible for you to communicate with your prospects and clients via SMS text messaging using a unique customer number, yet still have the conversation safely stored in your EZLynx account. This powerful tool is completely integrated into both the desktop and mobile versions of EZLynx, allowing you to text with your clients from anywhere, at any time.

EZLynx® is the agency solution that is truly ONE PLATFORM - for comparative rating, agency management, accounting, eSignature, consumer quoting, email marketing, text messaging, client self- servicing, and so much more! Instead of the patchwork of products that sort of talk to each other that most vendors offer, **EZLynx®** gives you login to access all agency solution tools that work together like a well-oiled machine. This eliminates potential E&O vulnerability by reducing the errors that often occur when using merely integrated systems. Having all the tools you need on a single platform streamlines your agency's workflow, cuts costs, and increases productivity.

www.ezlynx.com



The system you need for the business you want.

QQCatalyst is an agency management system that provides operational, marketing, and sales pipeline management tools. It enables agencies to strengthen customer relationships and ensure effective business management, so they can focus on growing their book of business.

Features you need:



Grow your sales pipeline: With Salesroom, you can identify new business, round out your current accounts, and strategically manage prospect sales cycles with the fully integrated sales pipeline manager.



Find new business with easy email marketing: Marketing Automation lets you create email marketing campaigns to better service your existing customers, cross-sell, or acquire new customers.



Monitor employee productivity to increase efficiency: Employee Productivity allows agencies to track the activities of their employees when using the system, so they can recognize leaders and get insight on how to improve productivity for all staff.



Provide exceptional customer service and easily manage policies: Policy Management allows you to give both existing and prospective customers a comprehensive summary of all their current and future insurance policies.



Manage your staff with increased visibility of their status: Employee Time Clock allows agency administrators to track the clock-in / clock-out activity of their employees and indicate which clock-out reasons are payable.

Customers see potential for:

- **Efficiency:** “It used to take 30 minutes a day to run business-critical reports. Now it takes 30 minutes once a month.”
- **Retention:** “QQCatalyst helps us retain customers by allowing us to identify problems before they occur.”
- **Revenue Growth:** “The QQCatalyst product is like having another team member without having to add bodies. QQCatalyst saves time, money, streamlines processes, and helps sell and service clients more effectively.”

Embracing insurance technology can be a big move. Every minute spent managing your technology is time spent away from your customers and business. That's why you need a solution built with you in mind. See how you can get up and running quickly with QQCatalyst.

They are with you for the long haul.

To learn more about QQCatalyst, call **800.444.4813** or visit www.vertafore.com



The foundational agency management system for your core business.

AMS360 enables you to focus on the heart of your business - your customers. It streamlines accounting, automates manual processes, and enables seamless connections with carriers, enabling you to grow your book and dedicate more time to customers and prospects.

Connecting your technologies

Successful agencies need to leverage a variety of technologies, including client engagement, market connectivity, analytics, CRM, payments, communications, lead generation, and more. As your business evolves and as new solutions emerge, it's more important for your AMS to integrate and connect with the tools you need than for it to do everything. To drive efficiency, your AMS should connect to all your technology.

Features you need.



Increase employee efficiency with guided workflows: QuickNavs help staff increase their efficiency and improve consistency with a customizable workflow that helps guide them through their work, the way they want to do it.



Service customers quickly to provide an exceptional experience: With My Agency Home you can service customers faster with a dashboard that adapts to your agency's processes.



Make data-driven decisions to grow your book: My Agency Reports provides visibility into your data, with the ability to drill into details, so you can make data-driven decisions.



Automatically route messages and attachments to save time: Eliminate up to 50% of the time spent manually routing eDocs messages, attachments, and downloads from carriers by automating eDocs processing and storage.



Easily build polished and consistent proposals: Proposal Builder pulls policy data directly from your management system, helping you to significantly reduce risk and produce proposals quicker.

Customers see potential for:

- ✓ 30% reduction in time on accounting, financial activities.
- ✓ 50% reduction in time spent creating commercial P&C proposals.
- ✓ 50% reduction in time spent on data entry and reconciliation.
- ✓ 50% reduction in time spent manually routing documents and attachments.
- ✓ 1% increase in renewal rates with AMS360.
- ✓ 2% increase in the number of new deals per month

They are with you for the long haul.

To learn more about AMS360, call **800.444.4813** or visit www.vertafore.com



Opening Up Innovation

Applied DORIS® delivers the fundamental capabilities, workflows, and insurer connectivity you need to run your growing agency efficiently, and securely within a single system.



Automate daily operations - Manage accounting, client relationships, policy administration, document management and marketing automation in a single system.



Increase insurer connectivity - Instantly access policyholder information and exchange data with insurer partners in real time to ensure you provide the most accurate information to the insured.



Access your system anytime, anywhere - Maximize flexibility, security, and access to information via the Applied Cloud, so you can stay connected at all hours and from any location.

Applied EPIC® powers your agency with the only system in the industry that has integrated capabilities to manage P&C, Benefits and Sales in a single application.

Key Benefits



Gain a single view of your customers - Manage all roles, locations, and lines of business within a single application to reduce time and cost spent operating multiple disparate systems.



Connect with your insurer partners - Access new markets and automate policy information exchange with your insurers without having to leave the system.



Manage sales processes and opportunities - View performance against sales goals and opportunities with role-based, intuitive dashboards to easily track new business opportunities and renewals.



Connect with partners through an open, integrated system - Maximize your business value through seamless integration with third-party applications, proprietary systems, and other data sources.

Applied RATER® provides more product choice in less time with a single point of data entry to automate the exchange of information directly to insurers' websites, reducing time spent managing duplicative data entry.

Key Benefits



Quote with greater accuracy - Pull quotes directly from insurer sites into the application to quickly compare and present accurate and bindable rates to your clients.



Access the broadest range of insurers and product line coverage - Automate the quoting process with more than 525 insurers and across all personal lines of business in a single application.



Integrate rate quotes directly into your daily workflow - Utilize a single point-of-data entry and validation with existing customer and prospect data pre-filled from your agency management system.

Applied CSR24® is the industry's first online customer self-service software that connects your customers to information in your management system, so you can service your customers when and how they want.

Key Benefits



Improve customer retention and acquisition through self- service -

Provide your customers with the freedom to interact with your business anytime, anywhere with access to insurance information, documents, online bill pay messages at their convenience via online portal or mobile app.

Reduce time and cost to service accounts - Eliminate manual, paper-driven processes by delivering customer documentation via your online portal in seconds.

Automate premium certificate processing and management - Access the latest ACORD forms, view customized templates, and utilize paperless delivery to process and print more certificates in less time.

Applied Mobile® is the first insurance agent mobile application to bring client, policy, and sales information from your agency management system to mobile devices, so you can stay connected on the go with a direct link back to the office.



Access information at the tap of an icon - Carry convenient, on-demand access to client and prospect insurance information with you while on the go.



Track sales opportunities - View, add and manage sales opportunities directly from your mobile device, with information synced directly to your agency management system for seamless connectivity.



Keep activities synced between systems in real time - Ensure the most up-to-date information is available to all staff with activities and opportunities instantly added to the appropriate account in your agency management system.



Tap into native mobile capabilities - Work more efficiently by leveraging mobile native applications, like maps, to pinpoint nearby locations for impromptu meetings and communication channels to call or send email and instant messages to clients, prospects, and colleagues.



Begin a quote while on the go - Start an application in the field and the information is automatically sent directly into your management system, enabling staff back in the office to begin the quoting process in real time.

Ready to Learn More?

www1.appliedsystems.com



AgencyMatrix™ is the web-based insurance management system your agency needs to maximize efficiency, productivity, and sales ... with prices and features the others cannot touch. As an independent insurance agency, you need one of the best agency management systems, with cutting-edge technology, an easy-to-use interface and dedicated support. Agency Matrix is committed to delivering insurance software solutions that meet these criteria and will help you reach your business goals. Agency management does not have to be hard.

AgencyMatrix™ is the fastest growing insurance management system on the market. By simply aligning their mission with the goals of the independent agent, Agency Matrix is able to provide a simple, easy-to-use product that provides the efficiency and effectiveness that agents need, so they may focus on what is most important to their business—servicing and growing their book of business.



Improve Your Business with **AgencyMatrix™**



Business Productivity - Insurance agents will get more done in a timely manner Using cloud-based software, more than any other business.



Virtual Employee – An automated agent robot who completes a full day of work before your competition even opens their doors.



Exceptional Mobility - Designed to configure to the size of your mobile device and allow you to manage business from anywhere.



Burden-Free – Helps eliminates the nuisance/problems of cumbersome administrative processes and gives you time to grow your book.

Agency Management System	 HAWFOSFT	 EZLynx	 QQCatalyst	 APPLIED	AgencyMatrix™
Set Up Fees	\$868.00	\$1,750.00	\$1,000.00	TBD	\$599.00
Monthly Fee Per User	\$404.00 - 4	\$400.00 - 4	\$104.00	TBD	\$299.00 - 4
Plan Type	Standard	MAP	Professional	Doris	Professional
Nationwide Co Op	No	No	No	No	No
Contract Required	Annual	Annual	Annual	Annual	No Contract
System Features:					
Accounting	X	X	X	X	Limited
Acord Forms	X	X	X	X	X
Agency Intelligence	X			X	X
Agent Dashboard	X	X	X	X	X
Automated Marketing	X	X	X	X	X
Automated Reports	X	X	X	X	X
Carrier Downloads	X	X	X	X	X
Cloud Based	X	X	X	X	X
Commission Reconciliation	X	X	X	X	X
Comparative Rater	Add on Feature	X	Add on Feature	Add on Feature	Add on Feature
Consumer Portal	X	X	X	X	X
Custom Workflows	X	X	X	X	X
Customer Management	X	X	X	X	X
Direct Scan	X	X	X	X	X
Document Management	X	X	X	X	X
Drag and Drop Attachments	X	X	X	X	X
eDocs and Messages		X	X	X	X
Email Marketing	X	X	X	X	X
Employee Time Clock				X	X
eSignature	Add on Feature	Add on Feature	Add on Feature	Add on Feature	Add on Feature
Google Map Integration	X	X	X	X	X
Lead Generation	Add on Feature	Add on Feature	Add on Feature	Add on Feature	Add on Feature
Marketing Automation	X	X	X	X	X
Mobile Solutions	X	X	X	X	X
Policy Management		X	X	X	X
Rater Integration	X	X	X	X	X
Sales Reports and Proposals	X	X			X
Telephony Integration	X	X	X	X	X
Training and Support	X	X	X	X	X
Website Integration	X	X	X	X	X
X-date Tracking	X	X	X	X	X

Pricing and features as indicated are believed to be true and correct via current information obtained from the internet and are subject to change without notification.

A photograph of two men in business attire, one wearing glasses, looking down at a tablet device. They appear to be discussing something on the screen. The background is blurred.

Comparative Rating
to improve efficiency and accuracy

Personal Lines Rating



Insurtech for the Independent Agent.

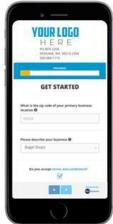
IBQ®'s cutting-edge insurance technology gives you powerful tools to compete in today's marketplace. With a true "real time" rater, you get the accuracy and efficiency of quoting your clients with rates directly from the Insurance Carrier systems. The **IBQ System®** is built as a transactional platform. This transactional vision is years ahead of the industries capabilities however IBQ is ready when the carriers' capabilities catch up.

Personal Lines Comparative Rater

The XML real-time rater is loaded with efficiency tools that have eliminated redundant keystrokes. IBQ was the first to offer true bundling of auto & home via our Matrix Pricing Tool. The rater is fast and has unparalleled accuracy since the rates are returned by the carrier.

Package Rating Every Time - Every quote done in IBQ returns a mono-line rate, along with a package account credit rate. This ensures all agents are provided with a cross-selling opportunity for every single quote. Cross selling means higher retention rates, which equal increased profitability.

IBQ Matrix - The Matrix shows you the least expensive Auto Insurance bundled with the least expensive Home Insurance, to provide the absolute bottom line for your clients. You can mix and match various carriers to suit the ever-changing needs of existing and potential clients.



IBQ® presents you the tools to compete against the online direct writers. Millennials are not the only ones looking for insurance quotes from a mobile device now a days. Is your website meeting the needs for ALL your customers? You can quote customers and prospects directly from your website whether they visit using an iPhone, Android, tablet, or computer. Is your website meeting the needs for ALL your customers?



MOBILE FRIENDLY - Whatever device your customers use you will be able to quote online.



RATES RETURNED DIRECTLY TO YOUR CUSTOMERS - IBQ prides itself on accurate rating and is now extended out to your consumers.



IMPROVE YOUR CUSTOMER EXPERIENCE - More customers are searching for insurance online, is your agency website making a positive impression?



EASY TO USE INTERFACE - Prospects will be guided step-by-step in getting a quote. No more forms or crammed spacing issues, customers will even see pictures of their vehicle once entered.



EMAIL NOTIFICATION - If a customer starts a quote or finishes, you can set up email notifications at any point, so you never miss a lead.

Ready for IBQ's Comparative raters?

www.ibqsystems.com



Quote multiple companies fast and accurately.

TurboRater is a completely web-based comparative rater, TurboRater and is accessible from any Internet-connected computer, tablet, or mobile phone, which makes it easy to share quotes between offices. TurboRater uses cloud storage to back up your data daily, making the software a cost-effective solution for your agency without the need for expensive servers and equipment. Additionally, the extensive reporting capabilities in TurboRater let you monitor your agency's performance.

Automobile, Home, and Motorcycle Insurance Rating System.

The most valuable service you offer your customers as an independent agent is finding the coverage needed for the best price through analyzing several insurance companies. TurboRater makes it easy to provide this analysis within seconds of the customer's request.

TurboRater eliminates the need to enter quote information into multiple companies' websites decreasing the opportunity for data entry errors and is easy to use and accurately rates auto, homeowners, condominium, and renters' policies. When you rate with Multico by ITC, you can be confident in the quotes you provide your clients.

Why TurboRater by ITC?

Increase Revenue - Increase agency revenue by decreasing the time necessary to quote a policy thus giving your producers and CSRs more time for new sales and account rounding activities.

Save Time - Save time and money by creating standard workflows, lowering the amount of employee training needed and removing duplicate data entry through our personal lines comparative rater.

Improve Efficiency - Improve agency efficiency by using **Multico®** TurboRater's extensive reporting capabilities.

Latest Technologies - Multico® TurboRater provides the most up to date in cloud technologies to provide you with multiple carrier quotes in an average of four seconds.

TurboRater Features

Producers and CSRs can provide quotes quickly thanks to the standard workflows in their insurance comparative rater that requires less training and reduces data entry errors. Available in one of three plans - Starter, Professional and Enterprise, here are some other key TurboRater features that can have a big impact on your agency.

- ✓ Real Time rating and built-in underwriting provides accurate rates.
- ✓ Available drip email marketing with our agency marketing system AgencyBuzz does the follow up for you so you can close more leads.
- ✓ Single screen quote entry makes gathering information simple and fast.
- ✓ As a completely web-based comparative rater, company rate changes are applied automatically so you are always quoting on the most accurate rates.
- ✓ Extensive reporting capabilities track your agency's success and failures, so you can improve your efficiency.



PL Rating

Close more business in less time with a real-time comparative rater.

PL Rating™ is the independent agency channel's leading comparative rating solution that enables agencies to offer multiple competitive quotes in less time than it takes to get one from a carrier website. With standardized workflows, real-time carrier connections, and time savings through 3rd party integrations, it creates competitive advantages to help close business faster.

Time Savings



With over 300 real-time carrier connections, agents can accurately quote dozens of carriers in less time than it takes to generate a single quote through a carrier website.



Customer Experience

Set your agency apart by demonstrating to your customers that you are their trusted expert.



Higher Revenue

PL Rating™ offers flood, package, and Consumer Rater Quotes, all which can result in higher revenue. Plus, with faster close times, customer retention can be improved.

PL Rating makes quoting multiple carriers easier and faster than ever.

Ease of Use: The platform is intuitive and straight forward, making it easy to learn and effortless to implement.

Templates: Customize **PL Rating™** to work for your business. With templates, you can set various presets depending on different situations such as high-risk drivers or coastal properties. Templates allow you to speed your quoting process, ensure you do not miss any required fields, and provide consistent service to your customers.

Required Fields: Never miss the important information you need when quoting. **PL Rating™** integrates with your carriers, so you always capture all the specific required fields.

3rd Party Data: Through 3rd party integrations, agents can seamlessly pull in hard-to-obtain information such as VIN numbers, loss cost estimates, and more. Plus, the interview style workflow makes quoting easy and conversational.

Accuracy: Direct partnerships with all real-time carriers on the platform and the connections are carrier tested and approved to ensure accuracy in premiums.

Comprehensive: Quoting capabilities include Automobile, Homeowners, Package, Renters and Condos, and in California, Motorcycle and Dwelling Fire.

Agency Management System Integration: With AMS360 and QQCatalyst saves time by eliminating duplicate data entry. It also integrates with most other management systems.

www.vertafore.com/products/pl-rating



Easy Comparative Cross-Carrier Quoting

EZLynx spent their early days perfecting the game of real-time quotes and in doing so created the leading rater in the industry. Web-based technology allows you to get instantaneous quotes from 330 carriers in 48 states. Comparative cross-carrier quoting has never been this easy.

The days of entering consumer information individually into each carrier's system is over. One-time data entry in yields dozens of comparative quotes in just seconds. You can even log into your EZLynx account on your mobile device to access quotes on the go.

Key Benefits



Carrier Access - Instantly link to your carriers and support with 330 carriers across the continental US.



Quick & Easy Quoting - Pricing for up to 4 sets of coverages from each carrier including home & auto packages.



Streamline Renewals - Customers can update risk information securely online prior to re-quoting to streamline renewals.



Effortless Data Entry - Save time during quoting by pulling driver and vehicle data from LexisNexis® Data Pre-fill.



Simple Setup - Integrates with over 20 agency management systems and compatible lead-generators.



Protects Customers - Quickly deliver premium & coverage options via email with a secure connection for customer safety.



Increased Productivity - Pre-fill & save quote templates with common answers, producer codes, and underwriting information.



Protects Agents - Cloud-based system records all user activities for custom reports and to avoid E&O claims.

Features

- **Mobile Access** - Access your EZLynx account from your mobile phone.
- **Real-Time Quoting** - Instant, live carrier quotes from carrier sites.
- **Carrier Defaults** - Ability to set default answers to carriers' underwriting questions, and they will pre-fill new rating applications for home and auto.
- **Quote Templates** - Quote templates allow you to set common answers to the questions in an auto or home rating application. These answers will pre-fill a new rating application when the template is used.
- **Quote Scenarios** - Quote Scenarios are unique to EZLynx and allow you to get up to three additional premiums from each carrier based on different coverage baskets. This tool is very useful for upselling.
- **EZLogin to Carrier** - EZLogin is a convenient and quick way to access a quote on a carrier site. Click the button to automatically log into the carrier site and land on the quote.
- **Auto & Home Pre-Fills*** - Auto and home rating applications will pre-fill based on the default answers set to carrier underwriting questions.
- *Add on feature

Personal Lines Comparative Raters



Set Up Fees	No Charge	\$150.00	\$120.00	\$100.00
Monthly User Fees	4 users \$100.00	3 users \$75.00	3 users \$90.00	5 users \$220.00
Additional Monthly User Fees	\$10.00	\$20.00	\$30.00	\$16.00
Monthly Agency Fee	N/A	N/A	N/A	N/A
Plan Type	Comparative	Standard	Professional	Standard
Nationwide Co Op	No	No	No	No
Contract Required	No Contract	Annual	Annual	Annual

System Features:

Personal Lines Rating

X X X X

100% Browser Based

X X X X

3rd Party Integration

X X X X

Accurate Rates

X X X X

ACORD Forms

Limited X Limited X

Address Verification

X X X X

Agency Management Integration

X X X X

Agent Interface

X X X X

Auto and Home Prefills

Add on Feature	Add on Feature	Add on Feature	Add on Feature
X X X X	X X X X	X X X X	X X X X
X X X X	X X X X	X X X X	X X X X
X X X X	X X X X	X X X X	X X X X
X X X X	X X X X	X X X X	X X X X

Binders, Forms & ID Cards

X X X X

Carrier Selection and Bridges

X X X X

Client Center

X X X X

Cloud/Internet Based

X X X X

Commercial Lines Rating

Additional Fee	Additional Fee	Additional Fee	Additional Fee
X X X X	X X X X	X X X X	X X X X
X X X X	X X X X	X X X X	X X X X
X X X X	X X X X	X X X X	X X X X
X X X X	X X X X	X X X X	X X X X

Driver and Vehicle Prefill

X X X X

E&O Controls

X X X X

Email Campaigns

X X X X

Integrated Vin & Protection Class Data

X X X X

Motor Vehicle Report Integration

X X X X

Real Time Rating

X X X X

Reliability & Security Features

X X X X

Sales Tools

X X X X

Smart Marketing

X Additional Fee

Standard Reports

X X X X

Superior Support and Easy Setup

X X X X

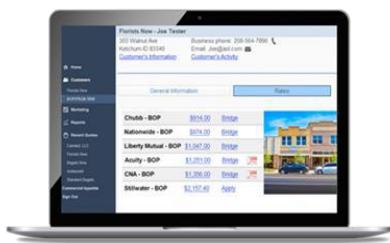
Pricing and features as indicated are believed to be true and correct via current information obtained from the internet and are subject to change without notification.

Commercial Lines Rating



Commercial comparative rating made easy

Commercial quotes can be a pain. You spend hours gathering info. Repeatedly enter the same info in carrier websites. Your customer hates waiting on the phone – wondering how much longer. You hate pecking away and asking, “how do you spell that?”



Save time - Enter data once in one spot. No need to visit multiple carrier websites for quotes.

Less work - Skip all the retying the same data into carrier systems. You will boost accuracy and reduce errors.

Better service - Offer quotes from multiple carriers so your customers get the best option.

Smart features for your agency

- **Agency management integration** - Export customer data into IBQ for remarketing. Or export from IBQ to your agency management system. No extra charge. Works with Vertafore, Hawksoft and Applied.
- **Class codes built in for faster quoting** - No need to look up class codes for every company. Our innovative lookup function makes it easy to get the right class for every quote.
- **BOP, WorkersComp & Mono GL** - Quote the most popular commercial lines from one spot—quickly and easily
- **Carrier appetite guide** – See carriers' appetite for certain risks before quoting and know where to place a risk.
- **99 vehicles in a quote** - Big fleet, no problem. Send Acord forms for up to 99 vehicles with a single quote.
- **Extra states included** - No nickel and diming for quoting extra states. You can quote for all 50 states for the same low price.
- **MGA & wholesaler rates** - See rates for MGA's and wholesalers prior to getting an appointment.
- **Google street view** - With Google street view built into the rater, you will see exposures around businesses you quote.

See a complete list at www.ibqsystems.com/carriers/



Offer commercial quotes from your website

Let your customers get quotes whenever they want. Customers visit your website. They get a real-time quote. You get a text or email with the details. Everyone is happy. Social distancing at its best. Insurtech for the independent agent.

Ready for IBQ's Comparative raters?

www.ibqsystems.com/commercial-rater/



The tool that is bringing efficiency to Independent Agencies.

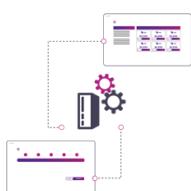
A single-entry solution designed to streamline the quoting process. You can submit quote requests online and get quotes from multiple insurance carriers. No more hassles of manual quote request or entry of quote request in multiple insurance carrier sites. Tarmika empowers independent agencies to work better, save time, and most importantly, increase efficiencies to help them write more business.

Enjoy the simplicity offered by technological innovation!



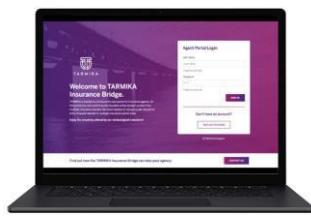
A solution built for independent agencies.

The technology enables agents and insurers to expand their distribution channels, gain new business and provide enhanced customer experience.



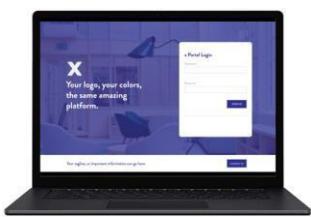
How the solution works.

The Tarmika platform utilizes API integrations with top carriers from across the country to seamlessly return multiple quotes through a single-entry process.



Tarmika Bridge

Data entry is a problem that has plagued insurance agencies for years. With streamlined underwriting questions, extensive NAICS mapping and various API integrations, the Tarmika Bridge allows agents to receive multiple quotes in a matter of seconds. Tarmika wants to make commercial insurance as profitable as it can be for independent agents.



Tarmika X

Still collecting data via email and phone call? The new insurance market relies on digital distribution for agencies and carriers. With rising customer acquisition costs for the independent agent, it is time to get in the game! Tarmika X is a complete end to end white labeled solution. The product, your brand, your website, and an easy-to-use customer interface. Tarmika X allows you to be the agent of the future.



They love what they do, are passionate and they care.

The Tarmika team comes to work every day to solve a major problem in every independent insurance agency: wasted time! Their goal is to help your agency work better, save time and most importantly, increase efficiencies to help you write more business.

A solution built for independent agencies.

www.tarmika.com



*Product will be part of the
Sales Cloud outlined in Agency Operations*



semsee.

Independent Agent's Go-To Platform for Quoting Small Commercial Business.

Semsee® has built an intelligent software solution that simplifies the complex world of small commercial quoting — which has been a manual, time-consuming, and onerous process. Their easy-to-use cloud-based platform streamlines the insurance experience for independent agents using patent-pending technology to automate manual workflows and connect with appointed carriers.

The Semsee Platform



Simple - Easy-to-use, cloud-based submission platform is intuitive for producers, marketers, and CSRs to manage your agency's quoting activity.



Smart - Dynamically combines carrier questions into one smart form, auto-filling business & property data and performing real-time risk appetite checks.



Fast - Their smart form is submitted to multiple carriers, immediately returning quotes to our platform & creating records in your carrier portals. No redundant data entry!

The Semsee Advantage



Productivity - New business quoting tasks that used to take hours will now take 15 minutes.



Retention - Deliver on what your customers want and have come to expect with efficient processing for both new business and renewals.



Value - Quote with multiple carriers in less time and highlight important coverage differences to advise clients on the best options for their needs.



Profit - Spend less time quoting and more time building your small commercial book of business, servicing clients, and generating revenue.



The fastest—and smartest—path from lead to quote

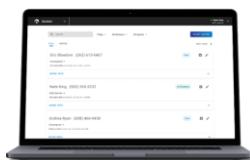
www.semsee.com



Quote and Bind in Record Time or build your Own Solution.

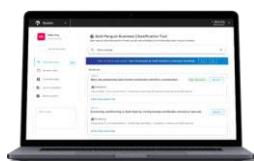
Bold Penguin rapidly increases speed-to-bind for commercial insurance. A highly efficient exchange that enhances the connections between businesses, agents, and carriers—reducing friction in the buying process for everyone. They integrate technology with the human touch and partner with top and insurance carriers to make underwriting, binding, and issuing small commercial insurance policies viable.

Quote and Bind



If you are an independent agent looking for an intelligent, single software solution that can be individually customized to how your agency quotes and binds commercial insurance – look no further. Fill out our Universal Application, carriers can then be ranked, coverage can be organized, and bindable quotes will appear consistently across your entire organization.

Universal Application



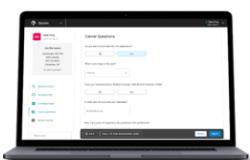
Our dynamic question set is seamlessly integrated with each carrier's required data set to provide unified data across each platform. Using the Exchange will eliminate the need for double data entry through multiple carrier portals. Information on a risk is entered through a single application and one or more carrier quotes will consistently appear.

Market Access



By creating neutral infrastructure, the Bold Penguin platform can connect you to a broad and expanding list of carriers. Gain market access to top insurance carriers, like Liberty Mutual, Progressive, CNA, Hiscox, Markel and others. You can leverage true sub-appointments with your own carrier credentials. Or leverage your direct appointments to quote and bind with your preferred carriers of choice. The world is your insurance oyster!

Integrate Now



Bold Penguin works with some of largest and best-known commercial insurance carriers to deliver their insurance products into the right hands. By integrating your product(s) with the Bold Penguin solution a carrier reaches greater distribution in a controlled and predictable manner. The online or offline integration is highly customized to the technical capabilities of the BOP, Bond, Commercial Auto, Commercial Property, Workers Comp, General Liability, Professional Liability, or Cyber coverages.

Insurance Intelligence at Bold Penguin is the next evolution in their efforts to make commercial insurance faster, more efficient, and more informative.

Commercial Lines Comparative Raters

IBQ Systems

TARMIKA

ZYWAVE

semsee.

**BOLD
PENGUIN**

	Set Up Fees	No Charge				
Monthly Fee	\$100.00	\$150.00	\$130.00	\$125.00	\$150.00	
Additional Monthly User Fee	\$10.00	\$25.00	TBD	None	\$25.00	
Nationwide Co Op	No	No	No	No	No	No
Contract Required	No Contract	Annual	Annual	Annual	Annual	Annual
<i>System Features:</i>						
Number of Users	4	3	3	Unlimited	3	
Free Trial Period	None	None	None	3 Months	None	
100% Browser Based	X	X	X	X	X	
ACORD Forms	X	X	X	X	X	
Agency Management Integration	X		X	X	X	
Carrier Bridges and Comparison	X	X	X	X	X	
Real Time Rating	X	X	X	X	X	
Reliability & Security Features	X	X	X	X	X	
Built In SIC Codes	X	X	X	X	X	
Carrier Appetite Guide	X					
Google Street View	X	X	X	X	X	
Data Dashboard		X	X	X	X	
<i>Lines of Business</i>						
Businessowners (BOP)	X	X	X	X	X	
Commercial Auto	X	X	X	X	X	
General Liability	X					
Workers Compensation	X	X	X	X	X	
<i>IAN Commercial Carriers</i>						
Allstate						
AmTrust	X		X	X	X	
Berkley North Pacific						
Berkshire Hathaway Guard			X	X	X	
BTIS	X					
CHUBB	X	X	X	X	X	
Liberty Mutual	X	X	X	X	X	
Main Street America Group			X	X	X	
Mapfre			X	X	X	
Markel		X	X	X	X	
National General						
Nationwide	X	X	X	X	X	
Progressive						
State Auto					X	
The Hartford	X					
Travelers	X		X	X	X	

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A close-up photograph of a person's hands wearing a dark suit jacket and white shirt. The person is holding a white stylus pen and is using it to interact with a black tablet screen. Their right hand is visible on the right side of the frame, and their left hand is holding the tablet. The background is blurred.

Digital Solutions

for superior service

DocuSign®

Send, sign, success

DocuSign® eSignature is the world's #1 way to send and sign from practically anywhere, at any time. It's part of the **DocuSign Agreement Cloud**, so you can extend these benefits to other stages of the agreement process, such as preparing, acting on, and managing agreements. Get remote work done faster and easier: From sales contracts and offer letters to account openings and invoices.

Agents are on the front line of the insurance business and staying a step ahead of the competition is critical to an agent's success. Whether your agency consists of just one agent or hundreds, DocuSign can give you the edge you need to compete for new business and serve your current customers with superior service.

DocuSign eSignature benefits

- ✓ **Do business faster** - Send and sign agreements securely from virtually any device. Up to 82% of agreements are completed in less than a day, and 49% in less than 15 minutes.
- ✓ **Be more efficient** - DocuSign eSignature eliminates manual tasks and increases convenience for your customers and employees.
- ✓ **Save money** - DocuSign eSignature saves an average of \$36 per agreement by reducing hard costs and improving employee productivity.

DocuSign for Insurance Agencies



Drive revenue by closing business deals quickly - Cumbersome paper processes monopolize your time and can jeopardize your relationship with your client. Documents are completed in minutes and returned error-free, reducing cycle time, increasing close rates, and delighting clients. Spend less time tracking down signatures and trailing documents and more time focusing on sales with DocuSign.

Speed up business processes, reduce Errors & Omissions –

Electronic signatures, documents are completed in minutes instead of days – all without errors – reducing E&O exposure. Data can be collected, captured, and verified at point-of-signature, then loaded directly into your system for downstream use. Ensures better compliance with your agency's E&O policy and better peace of mind.

Clients can sign documents easily – anywhere, anytime - Cloud-based, mobile-enabled technology provides clients with an easier, faster, and more convenient way to sign documents, complete transactions, and make payments, no matter where they are. Accessible on all devices, including PCs, smartphones and tablets and it supports iOS, Android, and Windows mobile devices.

The preferred eSignature solution of insurance agencies - With bank-grade security and round-the-clock access, electronic signature solutions are the preferred choice for insurance agencies, like the "Big I." Automate workflows throughout all core insurance operations, like underwriting, policy administration, billing, and claims management. You can cut costs for paper, ink, faxing, couriers, and overnight shipping dramatically.

It's time to get better.

www.docusign.com



eSignature Collection Made Easy.

formstack® Sign only takes a few steps to start collecting signatures electronically, so signing documents does not have to be a hassle. An electronic signature (or eSignature) is simply a digitally captured signature. eSignatures can be as simple as a name typed into a document or a signature by hand on a tablet or mobile phone. Signatures collected using Formstack Sign are legally binding. The Electronic Signatures in Global and National Commerce (ESIGN) Act gives the same legal weight to eSignatures as those signed with pen and paper.

Powerful digital signature automation features



Mobile Signing - Send documents to customers or employees via text message so they can review and sign on their phone or tablet.



Drag-and-Drop Signatures - With Formstack Sign's intuitive drag-and-drop functionality, you won't need your IT department to prepare your documents for signature.



Signature Templates - Quickly create templates for the documents you frequently need and apply all fields with just one click.



Auto-Reminders - Schedule auto-reminders so your team doesn't have to worry about repeatedly emailing clients to collect signatures.



Sign Open API - Don't see the integration you need? Our open API makes it easy to connect Formstack Sign to your favorite tools.



HIPAA Compliant eSignatures - Safely eSign documents that contain healthcare data with our easy-to-use eSignature solution.

Let customers eSign from anywhere.



Simplify eSignature collection - Still mailing, scanning, or faxing paper forms? Formstack Sign is an easy, secure way for **insurance companies** to collect signatures online. Simply upload your documents, add your signature fields, and email or text documents to customers for eSigning. The process only takes minutes!



Exceed compliance standards - Collecting electronic signatures for the insurance industry requires compliance with various regulations and security standards. To meet these requirements, Formstack Sign offers multiple security features, including TLS email encryption, legally compliant audit trails, and HIPAA compliance.



Connect to your agency system - Formstack Sign works seamlessly with multiple agency management systems so your eSignature workflows are smooth and uninterrupted. Safely send signed **quotes**, proposals, **policies**, **claims**, and other documents to systems such as Applied Epic, Vertafore, QQSolutions, GBS, Jenesis, and Xanatek.

Reclaim your workday.

www.formstack.com



Simple file sharing and e-signature software for insurance professionals.

ShareFile® sends out policies, audits, certificates of insurance, brochures, and endorsements with just a click. You can even send applications and other files for e-signature right from your **ShareFile®** account. Recipients can download files instantly — no software, plugins or account needed. **ShareFile®** also supports your HIPAA compliance with bank-grade security in the cloud. It is like an insurance policy for your data.

Accelerate productivity with automated workflows you customize and control. Give real-time feedback, request approvals, co-edit—even get legally binding e-signatures seamlessly—on any device. Plus, with real-time tracking, you always know exactly where things stand.

Start getting work done your way



Securely share large files - Easily access, send, and sync. No cumbersome FTP, CDs or thumb drives required. See exactly when files are downloaded. Share entire folders for easy file exchange with clients and vendors. An intuitive mobile app lets you access and share files from your smartphone, tablet, or laptop at any time and from any location.



Protect client and business information - Bank-level data encryption secures your files in transit and at rest. And with more than 25 customizable security settings, you have the power to recover lost data and prevent leaks. Encrypt emails and embed secure links to files right from your inbox with the ShareFile Plugin for Microsoft Outlook.



Get a partner in compliance - Trust us to provide the support you need to maintain regulatory compliance with the guidelines affecting your industry— HIPAA, HITECH, FINRA, CFPB, bar association ethics rules and more. Get solutions that support insurance business regulations, policies, and practices.

ShareFile for Insurance - The faster way to securely share and view data.



Microsoft Outlook Plugin - Encrypt emails and send and request files securely right from your inbox.



ShareFile Mobile Apps - Access, share, edit and store files anytime, anywhere, from iOS, Android, etc.



ShareFile Sync - Sync files from your desktop to keep your information up to date across all devices.



Airtight Virtual Data Rooms - Lockbox security for your most sensitive deals, including M&A, client studies, fundraising and more.



Enterprise-level solutions – Integrated IT solutions and unlimited cloud storage along with on-premises and hybrid options.

File sharing resources for insurance



Paperwork without the paper — or the work.

RightSignature® is easy to use for you and your clients. Powerful features for all your business needs.

For years, the most common way to get a signature on a PDF was to email it to your recipient, who would have to print it, sign the paper copy with a pen, and scan or fax it back. All these extra steps slow down what a very easy process should be and make it more likely that an important contract gets lost or forgotten. What the business world needed was a way to get **secure online signatures** on PDFs, and today, we have it. If you are looking for an online signature solution, try RightSignature® today.

Send and share documents with these easy options. Deliver RightSignature documents via email, with a secure link, or simply embed on your website.



Send the files you already have. Upload documents in common formats, including PDF, DOC, DOCX and image files.



Get forms filled out flawlessly. Need to gather some information? Add text fields, date boxes, checkboxes and more.



One-click document preparation. Set up your document in just one click with our one-of-a-kind automatic field detection.

Professional, custom branding to put your best face forward. Make every document you send look like it belongs to your company by adding your logo, colors, and a photo of you.



Works on any device. PC, Mac, iPhone, iPad, Android and more — no downloads, no plugins, no hassle.



Get handwritten signatures. Sign documents with a real, hand-drawn signature for more authentic-looking contracts.



Step-by-step guided signing. Intuitive navigation flag and live progress bar helps reduce errors and omissions.

Work using the software you already have. RightSignature® offers useful integrations with over a dozen of the most popular software services on the web. Save even more time by automatically importing documents and contacts from Google, ShareFile, Salesforce, Dropbox and more.



Multi-party signing. Send a document to one recipient or several. You can specify the order in which they sign.



Send several documents at once. Have several documents to send to a single client? Send them all in one easy package.



Team-wide collaboration. Share templates with your team members, view usage statistics, and generate reports.

Digital Solutions Esignature	DocuSign®	formstack	ShareFile®	RightSignature
Set Up Fees	No Charge	No Charge	No Charge	No Charge
Monthly Fee Per User	\$25.00	\$26.00	\$24.00	\$20.00
Plan Type	Business Pro	Pro	Premium	Business
Nationwide Co Op	No	No	No	No
Contract Required	Annual	Annual	Annual	Annual
<i>System Features:</i>				
Automatic Back-Up & Storage	X	X	X	X
Basic Fields and Workflows	X	X	X	X
Complete Audit Trail - Real Time	X	X	X	X
Compliance	X	X	X	X
Custom Branding	X		X	X
Customer Service and Training	X	X	X	X
Documents in Common Formats	X	X	X	X
Email Documents for signature	X	X	X	X
Encryption - 256-bit SSL	X	X	X	X
Esignature Documents and Templates	X	X	X	X
Program Integration		X	X	X
Legally Binding Signatures	X	X	X	X
Mobile App	X	X	X	X
Multiple Languages	X	X	X	X
Office 365 Co-Editing	X			
Outlook & Gmail Plugins		X	X	
Password Protection	X	X	X	X
Reminders & Notification		X	X	X
Reusable Templates/Forms	X			X
Sign Documents Anywhere/Any Device	X	X	X	X
Simple Document set up	X	X	X	X
SMS/Text Signing	X	X	X	
Hand-Drawn Signatures				X
Digital Fingerprints				X
Embed In Website	X	X	X	X

Pricing and features as indicated are believed to be true and correct via current information obtained from the internet and are subject to change without notification.



Simplifying the most powerful transaction - your signature.

AssureSign® mission is to simplify the world's most powerful action—the signature. This declaration of agreement is the axis of trust that propels business engagements across the globe. The signature spans culture, industry, business size and geography, enabling enterprises to navigate commerce with confidence.

What Sets AssureSign® Apart



Highlight Your Brand - Branding is critical to your customers and the growth of a company. Customize your web portal your way. From your logo, to branded colors, create a unique experience.



Unlimited User - Multiple users, departments or functions that need to send documents for signature? No Problem. You can have unlimited users and can create sub accounts underneath your corporate account.



eSign Via Text - Looking to get documents signed from your customers in seconds not days. Send your documents out for signature via text message and get a response back instantly.

Features



eSign via Text - Improve your customers' overall experience - To maximize efficiency and meet your signers where they already are. Most of your customers are on the go, and they have their devices at the fingertips. Why not empower them with application that can make their lives easier? Signing documents via text message, does just that!



eSign In Person - Digitizing the traditional way to sign a document. Enables businesses to connect to a supported signing pad, Wacom, or Topaz, into their PC via USB to transition the normal signing process from paper to electronic. Want more information, contact us today!



eSign Anywhere - Sign documents with one click anywhere around the world. Traveling? In back-to-back meetings? Or struggling to get documents signed? With eSign Anywhere, you can receive documents via email to sign, but can sign documents on a mobile device, tablet, or computer.



eSign via Voice - The sound process of signing a document. Enables your customers to sign, affirm, and consent to your products and services from their telephone. Telephone companies and phone-based service companies often utilize verbal signatures as a method of capturing consent from their customers.



Integrations/APIs – Bridging the gap between your existing solutions and future applications is critical for success. That is why AssueSign offers different integrations and API options to insure you can have one version of the truth, when it comes to bringing you solutions together.

Business

As Low AS

\$2,000
Per Year[Learn More](#)**Professional**

Starting At

\$4,000
Per Year[Learn More](#)**Enterprise**

For Pricing

Call[Let's Talk](#)

Unlimited Users

Unlimited Users

Unlimited Users

Unlimited Templates

Unlimited Templates

Unlimited Templates

Certified JotBlocks

Certified JotBlocks

Certified JotBlocks

Multiple Documents

Multiple Documents

Multiple Documents

Multiple Signers

Multiple Signers

Multiple Signers

Workflow

Workflow

Workflow

Email Support & Access

Email Support & Access

Email Support & Access

Mobile App

Mobile App

Mobile App

Sent To Desktop App

Sent To Desktop App

Sent To Desktop App

Bulk Send

Bulk Send

Bulk Send

Signature Pads

Signature Pads

Signature Pads

SMS Text Message*

SMS Text Message*

SMS Text Message*

Phone Support

Phone Support

Phone Support

Salesforce Customer 360 Integration

Salesforce Customer 360 Integration

Salesforce Customer 360 Integration

Dynamics 365 Integration

Dynamics 365 Integration

Dynamics 365 Integration

SharePoint Integration

SharePoint Integration

SharePoint Integration

DocumentNow Inbound API

DocumentNow Inbound API

DocumentNow Inbound API

Conditional Logic

Conditional Logic

Conditional Logic

Static Links

Static Links

Static Links

DocumentTrak Webhooks

DocumentTrak Webhooks

DocumentTrak Webhooks

International Cloud Storage

International Cloud Storage

International Cloud Storage

Two Factor Identification

Two Factor Identification

Two Factor Identification

Single Sign On

Single Sign On

Single Sign On

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A photograph showing a professional setting. In the foreground, a person's hands are visible; one hand holds a silver tablet displaying a map or chart, while the other hand points at the screen with a white pen. In the background, another person wearing a dark suit and light blue shirt is seated, also holding a pen. The scene is set on a wooden desk with papers and a clipboard. The lighting is warm and focused on the hands and the tablet.

Customer Management

to stay in front of your clients

Spark™

Spark™ the Conversation

Spark™ will take your insurance agency communications from zero to 60 without an army of marketers. It helps independent insurance agencies engage clients with consistent communications and manage their agency's online reputation and integrates with most agency management systems to increase client engagement and save time.



Start a Conversation to Engage Clients - Clients and prospects want to hear from you.

They may wonder why they are not already. Customer satisfaction happens when your agency meets and exceeds expectations. Spark™ simplifies digital client engagement so you can exceed them more often.



Build an Agency for Your Community - Word-of-mouth is the most effective marketing tool. When you listen and address client concerns, you build a reputation for your insurance agency that attracts new leads who share your values. Spark™ streamlines reputation management and helps to boost your online reviews.



Retain Clients that Grow Your Business - The NPS® Campaign asks a single question that lets you track client sentiment and identify those who need more attention. With this knowledge and simple communication tools, you are empowered to retain clients who buy more policies and grow with your agency.

Simple Campaigns for Client Engagement

Spark™ comes with four campaigns to ignite your agency communications. These foundational campaigns are easy to set up and provide an instant connection with contacts locked in your management system—until now.



Monthly Newsletter - Consistently share relevant and engaging long-form content written by a team of professional writers to stay top-of-mind with your clients.



Insurance Intel - Demonstrate expertise and provide industry insights with an automated monthly communication featuring videos and graphic-rich insurance content.



NPS® Survey - Easily track customer sentiment with a one-question survey to help retain clients, turn detractors into promoters, and boost your referrals and online reviews.



Welcome Kit - Properly manage new customer expectations and assure them that you and your agency will be there right from the start of your relationship.

It Pays to Personalize

Today's insurance consumers expect more than ever before. Make sure your customer journey delivers a high-touch experience that you can easily scale as you grow.

- ✓ **Personal Ties** - Send personalized emails from each client's assigned insurance agent to deepen relationships and increase retention.
- ✓ **Valuable Insights** - We create relevant, timely content throughout the year to share with clients across all your digital platforms.
- ✓ **Robust Email Tools** - Who needs third-party email providers? With Spark™, it is easy to build and send custom emails to individuals or groups.

The Tools You Need to Build the Agency You Want

www.agencyrevolution.com

Note: Contact vendor for current IAN pricing.



Reputation Matters

Bluejay REVIEWS is dedicated to helping businesses increase revenue and build a solid reputation by turning reviews into revenue. Managing reviews can make a huge impact on revenue. 90% of consumers read online reviews before making a buying decision.

Bluejay REVIEWS helps improve and maintain a good online reputation.



- Automatically solicit reviews for sites such as Google, Facebook etc. Boost your overall star rating and online reputation.
- Easily monitor and respond to reviews from one online dashboard and app. Aggregating over 180 Review sites into one hub.
- Share your best reviews on your website & social media. In addition: Surveys, WebChat, Insights & Competitive Benchmarking.

How Does Bluejay REVIEWS Work?

Bluejay REVIEWS automates your review management making it simple to respond to reviews quickly, promote great reviews automatically, and turn your existing customers into a referral engine.

- Send personalized texts or emails to every customer automatically.
- Automatically send customers to review sites such as Google, Facebook, Yelp, Trip Advisor, Open Table, Etc.
- Monitor and respond to new reviews from all review-sites in one easy to use dashboard.
- Increase your overall customer ratings.
- Receive text and email alerts whenever your company receives a new review on any site.
- Promote your best reviews by having them automatically posted across your social media pages and website ultimately increasing your SEO rankings.

Benefits for Agents

- Boost online star ratings.
- Dominate local search.
- Gain more clients.
- Automate the review, solicitation, response & marketing process.

Month to month with no long-term commitments.



Mobile app to create & manage customers, reviews, and reports in real time.



Monitor reviews from 180+ sites and update business listings across 50+ sites.



API integration with Google to manage reviews directly and improve business profile rank.



Build and launch reviews, customer experience surveys, and promotion campaigns.



Track and report the health of your online reputation via NPS visitations, CSAT, and conversions.

Turn your reviews into more business.

www.bluejayreviews.com

Note: Contact vendor for current pricing



ROCKET REFERRALS®

Client communication made simple.

ROCKET REFERRALS® helps strengthen client loyalty, so you can stay focused on growing your business. It takes less than an hour to get your account up and running. You will work directly with a dedicated account management team from day one. No long-term contract or setup fees—simply pay month to month.

ROCKET REFERRALS® Believes



The best software fits perfectly into real life - Should work how you expect it to, yet better than you could ever imagine.



Everyone should have access to cutting-edge software - Every business, not billion-dollar companies, deserve the best software and support in the world.



There's greatness in everyone - All of your clients, team members and community will be successful with the right opportunity, tools, and support.

How ROCKET REFERRALS® Works

- **Find out what makes a client loyal.** - The Net Promoter Score (NPS) survey lets you discover who your happy clients are and who is likely to leave. Monitor client loyalty over time and rate your performance against your peers and adjust future communications based on how people respond to the survey.
- **Automatically send personalized messages at just the right time.** - 72% of unhappy clients say they do not hear from their insurance agent enough. Well-timed emails and personalized, handwritten cards can help fix this, improve client retention, and inspire your best clients to refer you or write a review.
- **Make it super easy for anyone to find you on the web.** - Online reviews give you better visibility and credibility on Google, Facebook and more. Collect reviews over time, and they will improve online reputation and search ranking. People read, trust and act on them.
- **Keep an eye on your performance.** - The feedback dashboard breaks down your NPS so you can see trends in client loyalty and the impact Rocket Referrals is having on client retention and new business.
- **The team is there every step of the way.** - You will work directly with an account manager to set up your account and monitor your performance and have exclusive access to our Rocket Squad user group.
- **Integrate your data with just about any system. Seamlessly.** - Syncing your data with Rocket Referrals is a cinch, meaning you will not have to run a daily report again. Extra perk: Zapier integration opens up new ways to automate tasks.



- ✓ Gain tons of new referrals, testimonials, and online reviews.
- ✓ Account managers will guide and support you every step of the way.
- ✓ Rocket Referrals works with almost every management system.

Grow your agency with tools that work.

www.rocketreferral.com

Note: See attached schedule for pricing.



Nurturing prospects into long-term clients

AgencyBuzz® is a lead management tool designed specifically for Independent Insurance Agents from the start. No longer are you forced to store customers in generic mailings lists with systems not designed for the insurance industry. It is an automated agency marketing system that does email, print mail, voice, and SMS. **AgencyBuzz®** increases closing ratios and improves client retention by keeping your agency in front of prospects and clients, through consistent, personal communication. Use it to automate follow ups with prospects, remind clients of renewals and payments, and solicit referrals.

Why AgencyBuzz?

- ✓ Are you following up with every lead that your agency gets?
- ✓ Do you have an agency marketing plan for retaining clients?
- ✓ Are you consistently marketing to current clients for referrals?

If you answered no to any of these questions, you need an automated agency marketing system that measures email campaigns, tracks when a client or prospect interacts with your email, organizes contacts by line of business and relationship status.

AgencyBuzz® helps you manage your leads, client information and keep track of contact information, including email, phone numbers and address; relationship status per line of business; birthdays; anniversaries; and referral source.

Automatic Follow Up - Follow up with contacts according to the schedule and conditions you set. If your usual follow up process for a lead covers 30 days, set follow ups for that month so when you have an influx of leads no one gets forgotten.

BuzzScore - Assign each contact in the database a BuzzScore indicating a contact's interest level with your agency calculated based on multiple actions, including opening an email, clicking a link, elapsed time since action and number of actions within a time period. Helps you determine which contacts are gaining interest in your agency and includes the trending direction of the value which allows you to see the prediction motion over the next 30 days.

AgencyBuzz® secret to successful marketing is to plan and build a smarter digital marketing strategy with one goal in mind: To grow your insurance agency.

Smart Strategy - Pairs agents with marketing experts to build strategies for digital marketing campaigns, including email marketing and social media marketing. Strategists support your real-time efforts to generate new prospects and retain your existing book by customizing messaging and distribution to meet your agency objectives.

Work Together – A dedicated team sets up, deploys, and measures marketing strategy and tactics to achieve ongoing growth and retention that result in a return on investment. The experienced team of digital strategists prescribe the best way to optimize your digital marketing programs.

AgencyBuzz® is dedicated to helping insurance agents grow their businesses and understanding the specific challenges and aspects of the Independent Insurance agency. Contact them today to learn more about **AgencyBuzz®**.

One Company. One Goal. Yours.

www.getitc.com

Note: See attached schedule for pricing.

Lead Generation

	Set Up Fees	
	Plan Type	\$500.00
	Monthly Fee	AgencyBuzz
	Users	\$150.00
Monthly Outbound Emails	<i>Unlimited</i>	5
Nationwide Co Op	25,000	25,000
Contract Required	50%	50%
<i>Setup Includes:</i>		
CRM Integration	X	X
Google My Business connector	X	
Facebook integration	X	X
Email and mailing verification	X	X
Pre-written custom communication templates	X	X
Training Session	X	X
Contact Import	2,500	50,000
Newsletters (First 12 months)		X
Lines of Business Campaigns		4
<i>System Features:</i>		
\$40 for every additional 1,500 contacts	X	
Analyze customers by account criteria	X	X
Birthday and Holiday cards	X	X
Build your own automated campaigns	X	X
CAN-SPAM Compliant		X
Collect online reviews	X	X
Collect testimonials	X	X
Customer feedback dashboard	X	X
Customer loyalty cards	X	
Customer welcome emails and cards	X	X
Email and phone support	X	X
Email Google and Facebook review requests	X	
Handwritten cards per month	X	X
Import Google My Business reviews	X	X
Net Promoter Score leaderboard	X	X
Net promoter surveys	X	X
Performance dashboard	X	X
Publish testimonials to your own website	X	X
Referrals thank you cards	X	
Rocket Referrals/Third Party API	X	X
Segment your customers with custom lists	X	X



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Your agency growth engine.

Agentero™ provides the premier agency growth engine augmented by a powerful layer of client interaction tools. Agentero lets you optimize your book, work more efficiently, and deliver a better experience to your policyholders. It is the singular solution for modern insurance agencies. Their mission is to usher in a smarter, more intuitive insurance ecosystem by giving agents more control over how they approach the future.

Give your agency more and deliver the mobile experience your clients expect.

Move your operations into the future, give your team a competitive advantage, and position your agency for growth - all in one comprehensive package.



More opportunities - A predictive pipeline that proactively surfaces cross-sells, up-sells, and other opportunities -allowing you to increase your revenue and save your time.



More customer satisfaction - A suite of client interaction tools enables you to provide the kind of service and experience your customers expect.



More control - A command center with intuitive display and easy AMS integration gives you full visibility into your opportunities and operations.

What's included:



Predictive pipeline converts existing data into actionable insights - You get a data-fueled pipeline that proactively surfaces cross-sells, up-sells, and other opportunities - at the right moments, so you know exactly how to use your time.



Smart workflows let you work more efficiently - You get a powerful layer of client interaction tools to streamline communication, automate mundane tasks, and cut down on busy work.



A command center puts you in control - You get full visibility into your performance, client stats, and analytics with a beautiful display and unlimited agent logins.

For Vertafore customers

Vertafore™ has joined with **Agentero™** to help agencies deliver the level of service your clients need. The Agentero app provides clients with 24/7 digital access to their policies, ID cards, with the ability to make payments, submit claims, and contact your agency.

Start growing your agency today.

www.agentero.com

Note: See attached schedule for pricing.



You sell the policy they automate the rest.

AgencyZoom® was made for Insurance Agents by Insurance Agents to help agents boost retention and standout from the rest, to keep customers coming back to your insurance agency. Get analytics on their amazing dashboard that shows you who is hitting goals and who is holding you back. Agencyzoom® tailors a plan specific for your individual agency.

Specifically built for your Agency!

Grow Your Book of Business

Sell More - Put your producers on a rocket ship with Agencyzoom's easy to use sales platform.

Streamline Your Service

Boost Retention - Stand out from the rest, to keep customers coming back to your insurance agency.

Know Where You Stand

Get Analytics - An amazing Dashboard that shows you who is hitting goals and who is holding you back.

Features

- **Close More Leads Faster** - Click and drag, it is that easy! Smart automation to make sure your insurance sales skyrocket.
- **Automate Engagement. Increase Retention** – Build an automated customer journey from prospecting, to renewals, and beyond.
- **Crush Your Goals!** – Know exactly what you and your insurance producers need to do to succeed today, this month, and this year.
- **Get 5-Star Reviews Automatically** - Month after month you will build up your insurance agency's Google Reviews automatically.
- **Lead From Anywhere**
 - Track producer performance while traveling
 - Ensure you are trending upwards, even when you are out of office
 - View reports directly from your phone
- **Mobile Lead Management**
 - Add new leads on site
 - Work your pipeline anywhere anytime
 - Close leads from home, in the airport, or even at the beach
- **Manage Tasks on the Go**
 - Take calls and add meeting notes from anywhere
 - Ensure important emails go out while you are gone
 - Create and assign tasks for producers

Hundreds of Integrations. Unlimited Growth!

www.agencyzoom.com

Note: See attached schedule for pricing.

LEVITATE

Keep in touch. Remember key details. Appear Superhuman.

Levitate® combines AI-powered software builds and maintain authentic relationships, which drive more organic referral and word of mouth business (the best kind!) and helps independent agents focus on what they do best: build relationships.

Grow your through the lost art of keeping in touch.

Mass blast email marketing won't cut it anymore. Break through the clutter and stay top of mind.



Drive referrals and repeat business by keeping in touch with past clients and prospects.



Account round with personalized emails



Save time and money with tried-and-tested insurance industry email templates.



Remember key facts and dates about every contact (never forget a birthday again)!



Work smarter in the email and calendar apps you already use.

How it Works

Levitate® combines the best people in the business with the first-ever, keep-in-touch marketing platform.



Marketing Coaches - Meet your new secret weapon.



Contact Management - Your contacts like you've never seen them.



Tags and Reminders - Simple, easy-to-use reminders.



Content Strategy - They make it easy.



Personal Email Campaigns - Emails look personal because they are.



Reporting and Analytics - Track every send and manage your team.

Make connecting easy.

www.levitate.ai.com

Note: See attached schedule for pricing.

Digital Solutions Contact Management	
	Set Up Fees
	Plan Type
	Standard Monthly Fee
	Nationwide Co Op Contract Required
<i>Features:</i>	
24/7 availability	X
AMS/CRM Integration	X
Automates client interaction	X
Business Card Scanning	
Custom Integration	X
Dashboard with intuitive display	X
Digital Solutions with Self-service capability	X
Email and Calendar Integration	
Google Reviews	X
Importing and Exporting Enhanced Contacts	
Improves Agency Efficiency	X
Increases Retention	X
Key Focus, Notes and Action Items	
Leverage data and streamline renewals	X
Live onboarding	
Messaging	X
Mobile App	X
Predictive pipeline	X
Reduce E&O Exposure	X
Reporting and Analytics	X
Smart Workflows	X
Supports Gmail, Google Apps, Office 365, MS Exchange Server, and IMAP systems.	X
Training and Support	X

 Agentero

 LEVITATE

 Agencyzoom

No Charge

Standard

\$99.00

No

Monthly

No Charge

Business

\$150.00

No

Monthly

No Charge

Single-Agency

\$79.00

No

No Contract

Pricing and features as indicated are believed to be true and correct via current information obtained from the internet and are subject to change without notification.



Everything You Need to Generate, Monitor, and Market Your Customer Reviews

Grade.us® easily generates, monitors, and markets online reviews important to your business. Make your reviews work for you. Customer reviews are the single most effective marketing strategy. Only *you* cannot do anything - your customers have to spread the good word about your business for you. Review Management needs to be an essential part of your marketing strategy to promote business growth. Make your reviews work for you.

Generate Reviews From Your Customers



Get more reviews with an easy, automated process using customized email campaigns, text messages and templates for physical assets.



Ensure you have reviews distributed across Google, Facebook and all of the industry-specific review sites that matter to your organization or clients.



Protect your reputation with an optional system that proactively catches unhappy customers before they write something negative about you online.

Monitor Reviews and Listen To Customers



Alert everyone on your team with automatic email notifications when new reviews are published.



Celebrate the positive reviews of happy customers and respond to negative reviews.



Generate reputation reports across locations to track review performance.

Market Reviews to Amplify the Customer Voice



Stream your greatest reviews to highlight social proof on your websites.



Share positive reviews as compelling and automated social media content.



Showcase reviews utilizing SEO schema markup to drive visibility in search.

The “Review Funnel”

An easy and unobtrusive way to ask and remind customers to review your business on the sites that matter to you.

DRIVE - Systematically drive customers to one conversion funnel that routes them to the review sites you care about.

GUIDE - Guide unhappy customers to a service recovery and educate others through completing a review.

AUTOMATE - Automatically ask, remind, and guide customers through the process with email, text, and print campaigns.

MONITOR - See results with beautiful monthly reports that demonstrate reputational improvement alongside actionable insights into campaign data.

MARKET - Choose which reviews to stream to your website or share on social media or have them automatically streamed/shared according to your criteria.

Thrive in a world where the voice of the customer is everything.

www.grade.us.com

Note: Contact vendor for current pricing.

Fuse™

Marketing Automation to Nurture Clients, Drive Referrals, and Grow Your Agency

Fuse™ uses data from your Agency Management System to automatically send the right message at the right time to your clients and prospects and enhance your customer experience, streamline operations, and save time!



Save Your Staff Time - Automates the delivery of custom messages for the important events in your customers' lives, and uses the perfect medium—email, text, postcard, or phone—for the occasion.



Easy Account Rounding - Makes it easy to identify gaps in coverage and to micro-target your list with specific marketing campaigns designed to round your accounts and sell more policies.



Increase Efficiency - Triggers automatic notifications to your staff when changes occur to your accounts, policies, and claims activity. Stay informed of the important events affecting retention.

Enhance the client journey to build relationships that grow your agency

Communication is the secret to client engagement and retention. Fuse™ helps you connect with clients and nurture leads using pre-designed campaigns delivered via automated, intelligent marketing tools.



Welcome Kit - Ensure every new customer has the perfect onboarding experience.



Lead Follow Up – Automatically follow up with new leads or carefully nurture those that did not convert.



Account Reviews - Reach every client for a strategic account review at regular intervals.



Disaster Messages - Rapidly share timely info before, during, after a natural disaster or weather event.



Referrals and Reviews - NPS® surveys track customer sentiment and turn detractors into promoters.



Lost Customer - Automated campaign to gather lost customer insights and win back lost business.



Account Rounding - Use advanced, yet easy-to-use audience segmentation tools to quickly identify account rounding opportunities and launch automated cross-sell campaigns.



Email – An intuitive and versatile email builder to craft the perfect email messages that reflect your agency and resonate with your audience.



Text - 90% of text messages are read within three minutes, making this communication channel is a critical medium to deliver important updates quickly.



Direct Mail - Some messages are best delivered the old-fashioned way and will send the perfect postcard and ensure it is delivered without you ever having to lick a stamp.

The Tools You Need to Build the Agency You Want

www.agencyrevolution.com

Note: Contact vendor for current IAN pricing.



bonjoro

Don't Just Say Hello Say Bonjoro

Bonjoro® is building the world's first Customer Delight platform to help great teams build real relationships with their customers at scale. Take client experience to the next level and send highly personal videos right to your client's inbox to keep them informed and engaged, delight and convert more customers and supercharge your business with 1-1 personal video messages



Increase your conversion rates - Converting customers is all about engagement. Bonjoro helps you bring prospects closer to your business and shorten that sales cycle from months to hours



Retain more customers - Make your customers feel like more than just a number. Elevate your relationships, show customers some love, and give them a reason to stick around



Drive word of mouth & advocacy - Drive more interest from your customers' friends, family, and social network. Your videos are easily loved and easily shared.



Increase client engagement - Use Bonjoro to keep clients engaged along their journey with your business. Thank them for coming onboard, follow up at key milestones, and let them know they are front of mind even in the downtimes



Achieve your goals - Over 15,000 companies have already used Bonjoro to get results. From converting more leads, boosting customer loyalty, to driving advocacy and referrals. Whatever your objective, Bonjoro can help!

Treat your customers better.

www.bonjoro.com

Note: See next page for current pricing

Pricing that grows with your business



Basic

\$12.50 user/month
Billed annually

50 videos per month
Custom branding
3 custom workflows
1 message template
Screen recording



Pro

\$33.00 user/month
Billed annually

Unlimited videos
Custom branding
5 custom workflows
5 message templates
Campaigns New
Screen recording
All Standard features
All Pro features



Growth

\$66.00 first user/month
\$17.00 per additional user
Billed annually

Unlimited videos
Custom branding
25 custom workflows
25 message templates
Campaigns New
Roll-ups New
(Send to a group)
Remove Bonjoro badge
Funnel Consulting Session
Screen recording
All Standard features
All Pro & Growth features

Standard Features

Message templates

Save time sending with templates for your Bonjoro videos. Each template links together your email design, video landing page, and call-to-action.

Screen recorder

Record and share helpful screen recordings for your customers with Bonjoro's Chrome extension.

Deliverability

Send from your own business email via verified domains, Gmail or Outlook, and see a detailed delivery history of all your videos.

Custom funnels

Integrate Bonjoro with your existing sales and marketing tools in a matter of minutes. Pull your contacts into Bonjoro at the perfect time via trigger events and tags in your own CRM.

Customer context

Your customer data is visible as you record, either pulled from your CRM, or enriched by us. This allows you to tailor each and every message for a genuinely personal experience.

Rich reporting

Track what's working with Bonjoro's simple results dashboard, and report back to internal stakeholders. Filter by team members, video interactions and dates.

Pro Features

Campaigns

Craft campaigns for different teams, or different jobs, such as onboarding, and retention. Each campaign contains different workflows, templates and results.

Priority support

VIP access to our dedicated support team for Pro and Growth plan customers. Support responses guaranteed in less than 30 minutes via Live Chat.

Funnel training

Dedicated 1 on 1 success training with one of Bonjoro's video-experts. Ask them anything, and get specific campaign recommendations based on your existing sales and marketing funnels.

Filmer accounts

Manage your team or client accounts with admin access, and restrict team members to filer-only accounts so they see only what you need them to see.

Team inboxes

Invite fellow team members into Bonjoro to make personal video a team effort, and set up team inboxes so you can manage your Bonjoro campaigns collaboratively.

Data exports

Create your own custom reports and dashboards with unlimited data exports. Make your request via Priority Support and we'll send your data right over.

Pro Features

Roll-ups

Send a broadcast video to a group of your customers. Just bulk-select which contacts you want to "roll-up", then record them a personal video.

Remove Bonjoro Badge

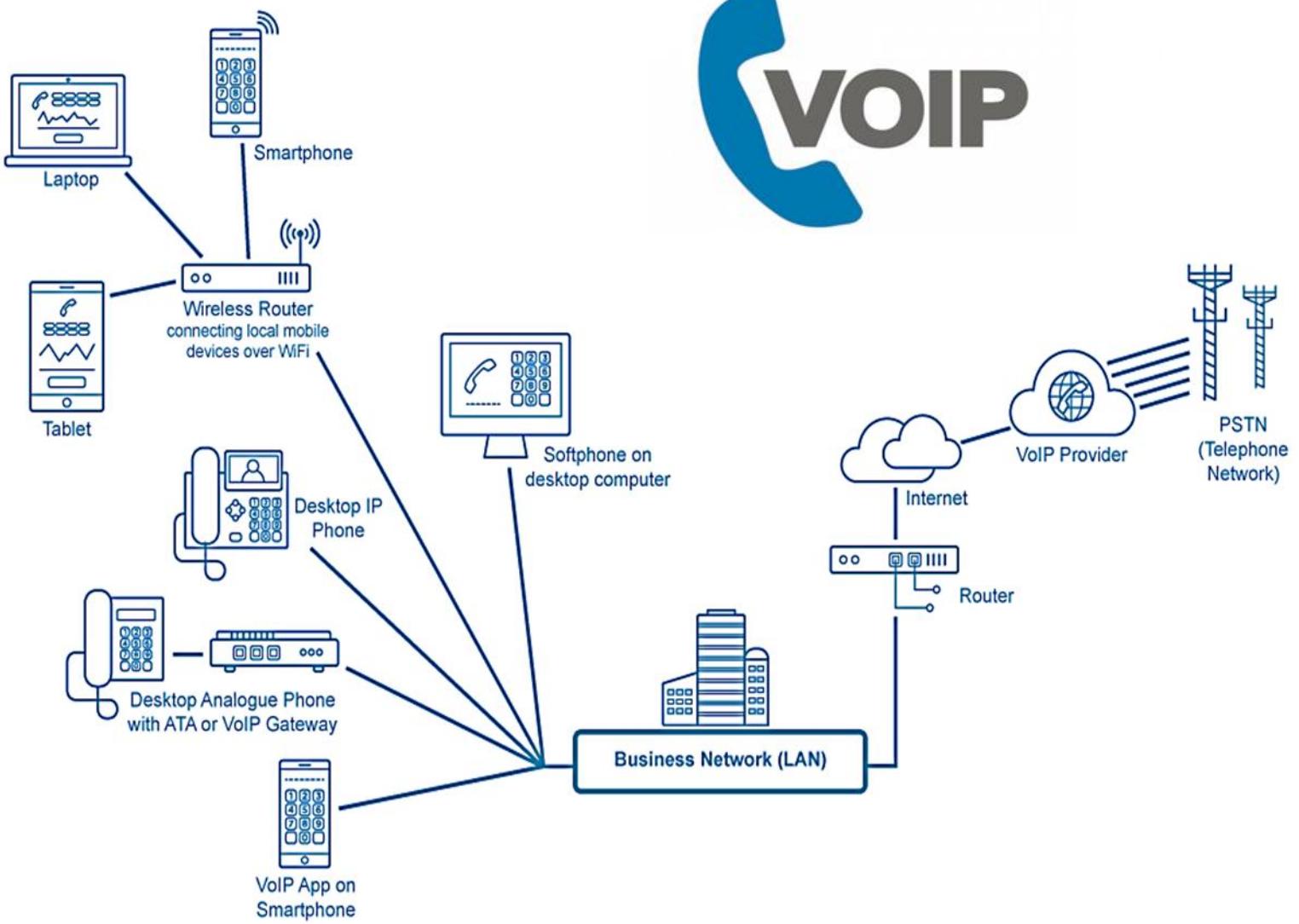
Stay on brand by removing our "Powered by Bonjoro" badge from your video landing pages.

More features coming!



Business Phone Solutions

to insure flawless communication





Work Together From Anywhere™

RingCentral® is a leading cloud-based communications and collaborations solutions provider and was named the number one market share leader in both revenue and subscriber count in its industry. Bring employees and customers together with the world's #1 business communications platform.

Meet the small business benefits that make life easier

- ✓ **Work together from anywhere** - Message, meet, call, and even fax using your favorite devices.
- ✓ **No more app switching** - Integrate with hundreds of work tools like Microsoft, G Suite, and Salesforce.
- ✓ **Never miss a conversation** - Stay connected with industry-leading reliability and a 99.999% uptime SLA.
- ✓ **Track the important stuff** - Add and remove team members, track service quality, and more - all from our admin portal.
- ✓ **Protect your team's data** - Keep conversations secure at every layer of your organization.
- ✓ **Distant does not have to mean apart** - Feel like everyone is in the room with HD audio and video calls.

Everything you need in one beautiful app

Message - Move projects forward with team messaging, file sharing, task management, and more—all in one place.

Video - Meeting remotely just got easier with HD voice and video, one-click join, and easy screen-sharing.

Phone - Get the modern business phone system with 50+ features.

Why customers choose RingCentral.



Affordable - Save 30% or more with all-inclusive monthly pricing from a single provider. There is no need for separate products or several vendors for a series of different services, so costs are reduced dramatically.



Simple to set up and use - Setup takes minutes, not days, with a dedicated onboarding specialist to ensure a smooth installation process and preconfigured phones that quickly connect to your existing internet service.



Any device, anywhere, anytime - The RingCentral mobile app turns your employees' desk phones, laptops, tablets, and smartphones into mobile offices, giving them 24/7 access anywhere they have an internet connection.

One platform for all your conversations

www.ringcentral.com



Connect your way with a flexible cloud phone system

GoToConnect® provides fully integrated business communications across phone, meetings, and messaging and has everything your business needs to run completely virtually - from cloud-based businessphones (VoIP), to video conferencing, text, and chat. Employees can collaborate seamlessly through a single browser, desktop, or mobile application, to stay productive and connected from anywhere.

Cloud-based VoIP phone service that allows you to communicate from any device

- **Keep your existing numbers** - If you have a long-standing number, no worries! Transfer your numbers to your GoToConnect service.
- **Choose what phones work for you** - GoToConnect offers a wide variety of IP phones, including VoIP headsets, fax solutions, and conference phone systems, all at discount prices.
- **Video conferencing for all your needs** - Host and join meetings right from your browser — no download needed. Share your live screen for presentations, demos and more.

With GoToConnect® cloud-based VoIP you get:

BIG Savings



- Low, all-inclusive pricing; No hidden fees.
- Unlimited extensions, ring groups, call queues, and more.
- Save over 40% with one provider for professional calls, meetings, and chat.

VoIP from Anywhere



- Manage your entire phone system wherever you are.
- Text, place calls, and host meetings using your softphone or mobile app.
- Route incoming calls directly to your cell phone to conduct business wherever.

Better Customer Interactions



- Get unparalleled visibility into your call flows including hold times and abandonment rates.
- Prevent lost revenue by making call routing changes in real time so you never miss a call.
- Integrate with CRMs for better workflows.

A Trusted Partner



- Safeguarded communication with layered authentication and encryption networks.
- Stay connected during disasters and outages.
- Redundant data centers to safeguard.

Feature-rich unified communications

GoToConnect® comes packed with over 100 features across cloud VoIP and web, audio, and video conferencing. All designed to make your users productive while providing IT with a single pane of glass to manage their entire UCC solution.

Let them be your GoTo

www.goto.com

Ooma® Office

Ooma to get big business features at small business pricing.

Ooma® Office is available wherever you are. Get reliable calls at your desk or on the go. Whether you are working at your desk or on the go, never miss another call.

Run your business from anywhere with the Ooma Office phone system.



Now more than ever, small businesses are harnessing their will to thrive, and Ooma is here to help. Save money and never miss a call with Ooma. Ooma Office is available wherever you are. Whether you are working at your desk or on the go, never miss another call.

Choose Ooma to get big business features at small business pricing.



Big business features - Virtual receptionist, extension dialing, conferencing, music-on-hold and much more.



Easy setup - Do-it-yourself installation sets up in minutes. Help is available with 24/7 customer support.



Keep your phone number - Or pick a new number in almost any area code for free.



Reduce costs - Unlimited calling to U.S., Canada, Mexico, and Puerto Rico. Flat rate monthly user pricing is all inclusive.



Work from home - Improve sound quality on your home internet connection. Features work just as if you were in the office too.



Grows with your business - Whether you have 2, 20 or 200+ users, the service easily expands.



Ooma Office Mobile App - Use your business number anywhere. Get extension dialing, text, flip calls, and more all from the app.



Ring multiple devices - Enable your business phone number to ring your office phone, mobile app, and an external device.



Automate incoming calls - Virtual receptionist can route and message callers, so you never miss another business opportunity.



Advanced features available - Upgrade to Ooma Office Pro and get Call Recording, Enhanced Call Blocking, and more.



#1 rated business phone system by PC Magazine

Ooma's cloud-based phone service was rated #1 in reliability by the readers of PC Magazine. Patented PureVoice HD™ technology means your customers experience crystal-clear calling every time.

Ooma Office stacks up to its competitors.

www.ooma.com



The Virtual Phone System for Small Businesses

Grasshopper® is easy to use and has tons of great features for any small business owner. Your business phone number combined with a complete virtual phone system. You're a small business owner, not an office manager. Grasshopper helps you focus on your business, so you can do what you are good at.

Grasshopper helps you do business.



All the communication features you need to help run your small business.

Separate work and personal - Get a business phone number plus all of the features of a robust phone system without the expense of additional devices. That way, your personal number stays private and you always know when business is calling.

Look and sound professional - Grasshopper lets you know when a call is business related so you can put your best voice forward. Your business will look bigger with features such as custom greetings and extensions that welcome callers and direct them to the right department or employee.

Never miss a call - Make and receive business calls and texts from anywhere with our desktop or mobile apps. Take multiple calls at the same time by routing them to another phone or team member, so your customers never hear another busy signal.

Answer every call professionally.

- See when an incoming call is for business so you can answer accordingly and sound professional.
- Make your business look bigger with an *automated greeting* to welcome callers and direct them to departments or employees.
- Get the perfect greeting by taking advantage of professional voice talent in our *voice studio*.

Get in touch from anywhere.

- Contacts will see your Grasshopper number on the Caller ID when you call using the app.
- Keep your personal number private by calling from your Grasshopper business number.
- Place calls from either your phone, or your computer with desktop and mobile apps.
- When your cell reception is weak, you can make calls with VoIP/Wi-Fi calling instead.

Respond quickly and quietly, without having to get on the phone.

- Many customers prefer texting to calling. Give them the option to text with your business number!
- Don't lose business – respond to missed calls from new clients automatically with instant response.
- **No need to give out your personal number** – you can text using your Grasshopper number.
- Get important information in writing with quick text confirmations.

Always stay informed.

- Easily check business messages by accessing your Grasshopper voicemail box online and in the apps.
- Get emails with MP3s and text transcriptions of your voicemails so you can quickly prioritize them.
- Your Grasshopper number is a virtual fax number! When customers send faxes, they arrive as PDFs in your inbox.

Learn more about ways to sound professional and grow your business.

www.grasshopper.com

Business Phone Solutions



Ooma Office



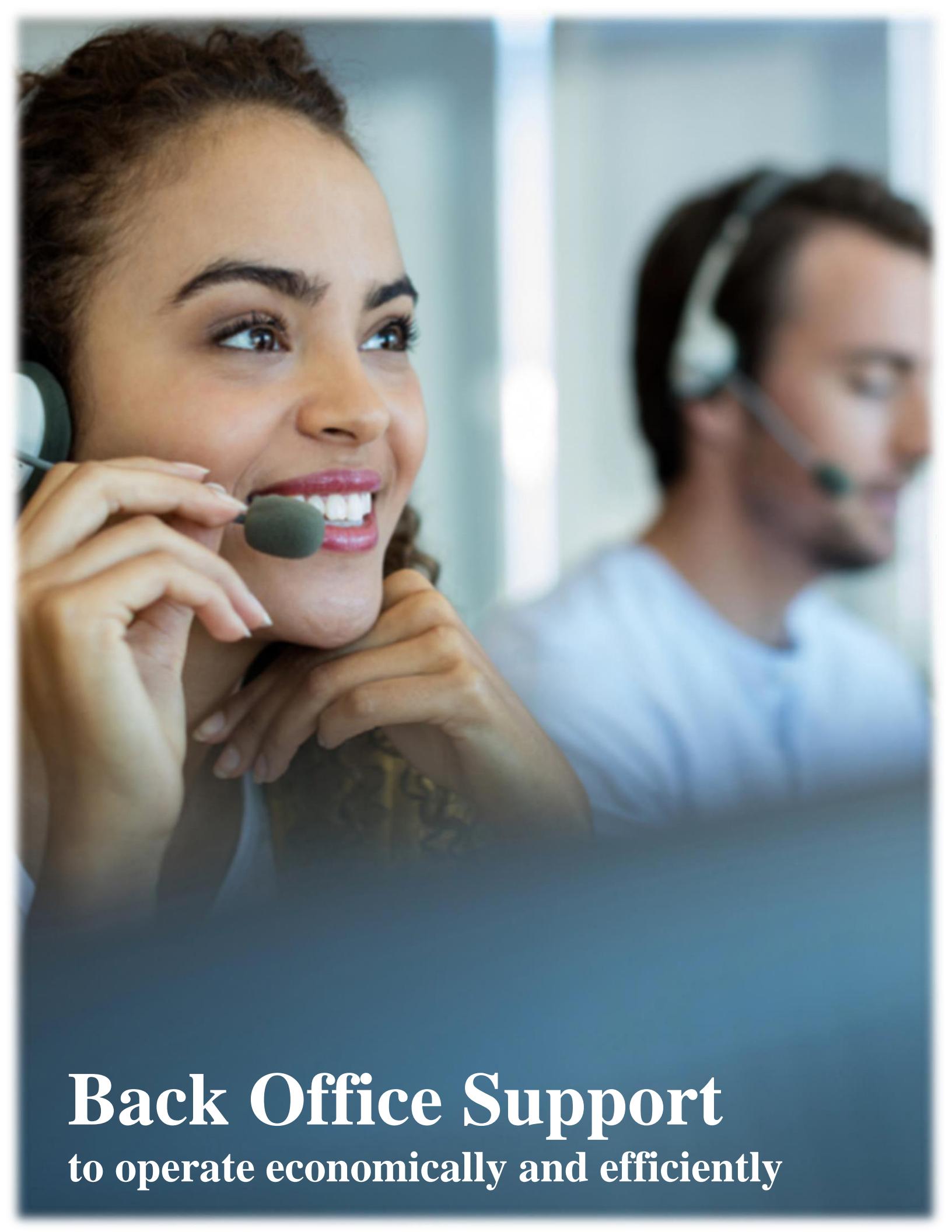
Set Up Fees	<i>None</i>	<i>None</i>	<i>None</i>	<i>None</i>
Monthly User Fee	<i>\$24.99</i>	<i>\$25.95</i>	<i>\$24.95</i>	<i>\$26.00</i>
Plan Type	<i>Standard</i>	<i>Standard</i>	<i>Office Pro</i>	<i>Solo</i>
Nationwide Co Op	<i>No</i>	<i>No</i>	<i>No</i>	<i>No</i>
Contract Required	<i>Annual</i>	<i>Annual</i>	<i>No Contract</i>	<i>No Contract</i>

System Standard Features:

	Unlimited	5-9 Users	Unlimited	1 User
Number Of Users				
Apps for iOS & Android	X	X	X	X
24/7 Customer Support	X	X	X	X
3-Way Calls	X	X	X	X
Auto-Attendants	X	X	X	X
Automated Receptionist	X	X	X	X
Business SMS Text	X	X	X	X
Call Analytics	X	X	X	X
Call Blocking	X	X	X	X
Call Forwarding	X	X	X	X
Call Monitoring	X	X	X	X
Call Recording	X	X	X	X
Call Reporting	X	X	X	X
Call Transfers	X	X	X	X
Call Waiting	X	X	X	X
Caller ID	X	X	X	X
Conference Calls/Call Bridging	X	X	X	X
Electronic Fax	X	X	X	X
Find Me/Follow Me	X	X	X	X
Join Calls In-Progress	X	X	X	X
Private Branch Exchange (PBX) Functionality	X	X	X	X
Queues	X	X	X	X
Remote Login	X	X	X	X
User Portal	X	X	X	X
Virtual Extensions	X	X	X	X
Voicemail	X	X	X	X
Voicemail-to-Email Transcription	X	X	X	X

NOTE: Visit the vendor website for additional features and details.

Pricing and features as indicated are believed to be true and correct via current information obtained from the internet and are subject to change without notification.



Back Office Support
to operate economically and efficiently



Putting experience to work

wahve® is a unique contract staffing talent solution that brings companies and *pretiring* individual - a vintage professional who has left the traditional workforce to transition to a work-at-home position who remain valued and engaged - together across the country to meet their work needs. As insurance industry experts wahve® understands exactly what you need and their affordable, smart talent resource solution takes the stress out of finding the right expertise.

A New Alternative

- Pairs companies looking for specific skills with the veteran talent who have them. Businesses get the quality and knowledge they need while vintage professionals get to phase into retirement working from their home office.
- Disrupts the idea that all work must be done in the office. Proving every day that older workers who have critical business skills, knowledge and expertise are able to deliver a high level of productivity and do so from their home offices.
- Breaks down barriers. By removing the requirement that workers be in the office, the walls that confine businesses to a smaller talent pool are broken down. Wherever the best talent is for the job, we help make it happen.
- Qualifies every candidate, then matches their skills to your needs, part time or full time. With an experienced wahve (work-at-home-vintage-expert), minimal training is required, in some cases, none at all. Wahves are tech-savvy and have the exact expertise you're looking for and integrate easily with your current staff.
- Wahves are eager to share their skills and knowledge in a remote position and you get a quality, motivated, committed, and productive worker – every remote worker has 25+ years of expertise that they bring to getting the work done.

Three steps to exceptional talent

1. Request

- You contact wahve® with your staffing needs.
- Discuss the talent you are looking for.
- Complete the online Job Request.
- Work with a placement specialist, who reviews your request and contacts you to discuss the details of your requirements.

2. Match

- wahve® matches your job requirements with the right experienced pretired professionals.
- You receive resumes for each wahve candidate who best suits your requirements.
- You decide which wahves you would like to interview over the phone.
- You choose the wahve you would like to work with and confirm working terms with the wahve.
- Your wahve is outsourced to you on an independent contract basis.

3. Work

- wahve® coordinates with your team to connect your wahve to your systems.
- They schedule training between you and your wahve on your workflow and processes.
- Your wahve becomes a fully productive extension of your staff almost immediately.
- You are billed just for the hours your wahve worked.

Creating a “wahve®” of change in the how and who of work.

www.wahve.com

Note: Contact vendor for current pricing.



Insuserve-1® exclusive services for insurance organizations are very cost-effective solutions that will assist you in reduction of both labor and E&O exposure and save you tremendously on your operating costs. **Insuserve-1®** goes the extra mile to deliver a measurable business value and delivers comprehensive outsourcing services and solutions based upon a careful understanding of their clients' business requirements. They combine business domain knowledge with technological competence and proven methodologies to produce high-quality results. Their goal is your goal: competitive advantage and productivity.

www.insuserve.com



Cover Desk™ wants you to be the *Independent Insurance Agency of the Future*. The world of insurance is changing. If you want to grow and thrive in a competitive world, you have got to innovate and find new ways to get the administrative work done. **Cover Desk™** provides high-touch, client-facing virtual professionals enabling insurance agencies to grow, thrive, and innovate in the 21st century. They do this by offering insurance agencies access to highly educated virtual assistants that provide the administrative help you need without killing your budget.

www.coverdesk.com



Virtual Insurance Pro® is a U S based company offering remote insurance services by providing high-quality, cost-effective customer service and back-office administration to the independent insurance agency force. Their operations are designed to match the best standards in networking, computing, and telecommunications services with knowledgeable and professional local staff, experienced in agency management and insurance carrier systems and products. They provide a wide range of insurance customer service functions.

www.vinsurancepro.com



Insurance Back Office Pro®, a division of **Flatworld Solutions**, has over 15 years of experience in offering a wide range of Insurance outsourcing services that meets all standards of the insurance industry. Their services cater to insurance carriers and agents, helps them save on cost, and focus on their business needs. **Flatworld® Solutions** understands the pain points and has a specialized team that can take care of all Insurance outsourcing requirements. If you are looking for accurate Insurance BPO services to **Flatworld® Solutions** is the solution you need.

www.flatwoldsolutions.com

Back Office Support Outsourcing Solutions				
	Set Up Fees	TBD	TBD	TBD
	Monthly Fee Per User	TBD	TBD	TBD
	Plan Type	Insurance	Insurance	Insurance
	Nationwide Co Op	No	No	No
	Contract Required	Annual	Annual	Annual
<i>Services provided:</i>				
After Hour Phone Service		X		X
Agency Management Services	X		X	X
Analytics Services	X	X		X
Appointment Setting	X			X
Auto I D Cards	X	X		X
Bookkeeping			X	X
Carrier Requests	X	X	X	
Certificates of Insurance	X	X	X	X
Claims Management Services	X	X	X	X
Client Communication				X
Commission Management Services	X	X	X	X
Data Entry Services	X	X	X	X
Document Indexing and Filing	X	X		X
Endorsement Processing	X	X		X
Invoicing and Billing				X
Legal Support Services	X			
Loss Run Processing	X	X	X	X
Marketing/Social Media Management		X		
Phone Support		X		X
Policy Administration	X	X	X	
Policy Issuance	X	X	X	X
Policy Management	X	X	X	X
Policy Rating		X		X
Premium Collections	X			
Prospecting		X		X
Quote and Proposal Summary	X	X	X	X
Renewal Exposure Summary	X	X	X	X
Underwriting Support	X	X	X	X
Website Design	X			



insu serve-1
Insurance Back Office Process Outsourcing



cover desk



VIRTUAL INSURANCE PRO



**flatworld
solutions**

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A photograph of a person's hands interacting with a laptop keyboard. A futuristic, semi-transparent interface is overlaid on the scene, featuring several large, glowing white dollar signs inside hexagonal frames. There are also smaller, fainter dollar signs and some gear icons. The overall theme is digital finance or online revenue generation.

Lead Generation

increases revenue



High Performing Insurance Leads and Calls

AWL® is the premier Customer Acquisition Marketing business focused on the U.S. insurance industry, delivering tens of thousands of high-intent, qualified consumers to our customers every day. The heart of AWL's business is a proprietary Customer Acquisition Marketing (CAM) technology and services platform that allows AWL to attract, engage and qualify prospective consumers. AWL's CAM platform is based on a "closed-loop" architecture that incorporates data, analytics and real-time automated decision making to optimize performance across the entire consumer lifecycle. We help our customers - insurance agents, brokers, and carriers - acquire more customers profitably.

The AWL Difference

- **Highest Performing Premium Insurance Leads** - Helping clients acquire customers by providing high intent leads and calls with consumers actively looking for insurance. Suite of Premium Lead products enables contact and close rates that are proven to outperform industry averages.
- **Live, Qualified Calls with 100% Contact Rate, Guaranteed** - Leveraging a state of the art 250+ person call center located in Texas, calling call tens of thousands of consumers every day to verify the *Accuracy* of their contact information, the *Legitimacy* that this consumer requested the quote and the consumer's *Intent to speak with an agent* right away about an insurance quote.
- **No Contracts or Upfront Deposits** - Knowing agents care about results, so it is important to continuously earn their business with a quality product. Many agents that have been with us since our start in 2005. Pay only for the leads and calls you receive!
- **Fast Lead Delivery** - Agents can often reach consumers while they are still sitting at the computer! Receive leads by email, text message, or both. Leads are also compatible with most Lead Management and Comparative Rater Systems.
- **Excellent Customer Service** – A team of support professionals is ready to offer email and phone assistance, in addition to 24/7 online account access. In fact, our team won the 2014 Silver Stevie Award for Contact Center of the Year.
- **Advanced Targeting** - Receive only the leads that make sense for your business! Free geographic targeting by zip code + radius, county, area code, and state. Optional demographic & lifestyle filters also available.
- **You are in Control** - Access full-service, online account 24/7 to control daily and weekly lead volume, filters, and billing preferences. As part of the Service Plan, you gain unlimited access to temporarily pause your leads whenever is necessary and can even set a regular schedule on your lead delivery hours.
- **Fair & Easy Return Policy** - Take advantage of a fair and easy return policy that gives agents FULL PRICE credit for invalid leads with no monthly cap.

Create a custom profile and start receiving products that will help you grow your business.

www.allwebleads.com

***Product currently approved for Co-Op reimbursement
with Nationwide Insurance.
Note: Contact vendor for current pricing.***



Compare Insurance Companies Head-to-Head

Quote Wizard® provides end-to-end solutions for insurance shoppers and agents alike. That is why over 40 million people have used **QuoteWizard®** to lower their rates. Every insurance carrier is different. They cover the pros and cons, plan specifics, and ratings for 30 companies. They get down to the nuts and bolts of top companies by comparing them directly.

Insurance made Easy – Compare rates and get informed in one stop



Competitive Quotes - Get quotes from agents who want your business.



Get Answers - They anticipate your insurance questions.



Plain-Speak - No jargon, they break it down for you

5 Factors That Impact Insurance Rates



Bundling insurance plans like home and auto will slash your rates.



Insurance agents can find discounts and details that you may miss.



Not a risk taker? Minimal coverage costs less, but it puts you in a precarious position.



Insurers regularly raise rates. Staying with the same company may cost you.



Your neighborhood plays a big role in the price of your premiums.

- **Auto Insurance** - Car insurance comes with a lot of moving parts like requirements, rates, and risks can vary dramatically from one city or state to the next. These differences are not necessarily obvious or intuitive. They give you the tools, insight, and know-how to find the right policy at the right price.
- **Home Insurance** – They know buying homeowners insurance is a major decision. They provide you with practical tools and insight, so you know what to expect.
- **Renters Insurance** – Protect your stuff from the unexpected. Renters insurance covers your possessions, assets, and liability. Best of all policies are affordable and simple. Although they are not affiliated with a renter's insurance company they have connected over millions of people to better rates.
- **Health Insurance** – They make purchasing health insurance plans for seniors, students, and everyone in between easy with helpful guides and recommendations.
- **Life Insurance** – They help answer the questions "How much life insurance do you and your family need? What kind of policy is best for you? What company should you choose?" with recommendations and expert advice.

www.quotewizard.com

**Product currently approved for Co-Op reimbursement
with Nationwide Insurance.**
Note: Contact vendor for current pricing.



Premium Insurance Leads That Agents Endorse!

Hometown Quotes® was built and is run by insurance industry experts and the sole business is providing high-quality, real-time auto, homeowners, life, and renters insurance leads at extremely competitive prices. Our custom pricing is based primarily on product type and risk class. With real-time insurance leads, you spend less time finding the right contact and more time closing deals.

Hometown Quotes® lasting relationships with many major insurance carriers, allows them to offer pricing discounts, monthly promotions and, in some cases, subsidies on auto, homeowners, life and renters leads. Get the Hometown Quotes Advantage and see how we can help you grow your business every step of the way.

Why Agents love Hometown Quotes

- 80% Reported Quote
- SEM Generated Leads*
- Custom Account Control

- Rate Limited Distribution
- Acclaimed Customer Service
- Unlimited FREE Filters



74% of Insurance Shoppers Begin Online - Hometown Quotes finds only the most high-intent online shoppers using SEM marketing.



HTQ Validates Leads 3 Ways - Checks that all leads are fresh (not recycled) by checking the born-on date of each lead delivered and validate email addresses to make sure they are active.



Limited Lead Distribution - Leads delivered to up to 4 agents. In most cases, that number is much lower. Leads delivered in several ways: Email, Text, Rater, CRM, Dialer, and LMS.



Your Lead 4 Life - Even if you do not write a policy at the time of purchase, effective lead nurturing may bring them back around later.

How the Program Works



Delivers SEM Leads - Highly sophisticated marketing techniques locate online insurance shoppers with high intent to purchase, allowing delivery of quality leads in numerous ways.



Gives You Control - Based on your filters and other account controls, we pass these quotable opportunities onto you, so you can turn leads into policies.



Helps You Along The Way - Dedicated account managers have worked in the insurance industry for years, doing exactly what you are doing today and helping you succeed.

www.hometownquotes.com

**Product currently approved for Co-Op reimbursement
with Nationwide Insurance.**
Note: Contact vendor for current pricing.



Connect with consumers who ACTUALLY want a quote

ConnectQuote® is a customer solution designed for agents. Facts are facts, more agents have grown their book of business quickly using lead services. They stand behind their product and have only brought leads to the open market after seeing how happy their current clients have been. What makes their clients happy? Selling new insurance policies. If you are in a marketing lull with finding new real prospects or want to increase your current book of business, work with them. They are devoted to the business of insurance.

Why ConnectQuote® is Right for You



100% High-Intent Consumers - They generate all their prospects in-house and direct from search. That way, you can only call consumers actively looking for a quote.



Responsive Customer Service - They do not just sell leads; they go the extra mile to ensure you are set up for success. Every time you call, they pick up the phone.



Flexible Account Management - You have full control over your lead flow, marketing territories, billing, caps per day or hour, and you can pause when you need

Sales and Marketing Resources

- **Tips for Success: Before, During and After a Sales Meeting** - The key to success in a sales meeting is to prove to your potential new client that you can help them, that you can provide ways to reduce their risk and make them more secure. This requires thoughtful meeting preparation and an ability to listen closely to what your customer is saying. ConnectQuote® provides a detailed guide on setting up a successful meeting.
- **Scripting for Follow-Up Call Success** - Scripting is a technique you can use to improve the effectiveness of your calls. Knowing what you want to say and how you want to say it before you pick up the phone is the best way to have customers buy insurance from you. ConnectQuote® provides tips for scripting your follow-up sales calls.
- **Positioning Yourself as an Insurance Industry Influencer** - Traditional marketing is one way to attract new customers, but in this age of social media there are new methods that can be even more compelling. Become a respected insurance expert and position yourself as a leader in the field. The buzzword title for this strategy is *influencer*. An influencer is someone who has established credibility in their industry and has created a large and loyal audience.
 - **Show Extensive Industry Knowledge** - Build your own audience by blogging, writing guest articles in trade publications, posting on LinkedIn and social media channels, and generally any outlet that will take you. Craft your message and stay consistent.
 - **Use Influencer Marketing** – Give yourself a big boost by using the influencer marketing technique. Target others who you may already have a relationship, perhaps a high-profile customer and get endorsements from someone well known and trusted in your community.
 - **Deliver Services, Not Products** - As you are building your reputation as an influencer, it is important to remember that people see through marketing tactics. Always give your audience valuable information that they can use and focus on the service you are providing, rather than selling a product.

www.connectquote.com

**Product currently approved for Co-Op reimbursement
with Nationwide Insurance.**

Note: Contact vendor for current pricing.



Mobile and web marketing solutions for the Insurance Industry

Datalot® provides mobile and web marketing technology solutions for the insurance industry. It develops a pay-per-call advertising marketplace that converts mobile and web traffic into live phone interactions by allowing insurance carriers and agents to access transaction-ready consumers via live calls. Their real-time call marketplace can deliver the exact type of customers you are looking for directly into your existing sales process.

Datalot® is the leader in pay-per-call advertising for the insurance industry and has a revolutionary platform that turns mobile and web traffic into live calls pre-screened by their own US-based phone concierge agents. Pay-as-you-go with no contracts or long-term commitments. Generating new business could not be simpler or more cost effective.

Grow your business

Spend less of your time and money on marketing campaigns, and more time closing new sales.



Set scheduling and geographic filters, as well as a variety of advanced targeting options. You are in control of what calls to receive and when.



Their expert team of digital marketers run mobile search and web click-to-call ad campaigns for the products or services you sell.



Their concierge phone agents screen the calls with custom qualifying questions that you can choose before handing the calls off to you.



Their phone agents do a warm hand-off of the qualified call to your sales team. You only pay for calls you receive that match your criteria.

- **Live Customers On-Demand** – Forget clicks or form fills, they turn mobile and web traffic into phone conversations better than anyone.
- **Customers at the Right Time** – Use targeting criteria, such as time and geographic filters, to ensure you get the customers you want.
- **Easy Call Management** – Listen to live calls in progress, or playback and share previous call recordings for sales training and campaign optimization.
- **Real Human Call Qualification** – Their live US-based concierge agents provide courteous, professional call qualification and hand-off to your team.
- **Simple Yet Powerful Reporting** – Their easy-to-use dashboards help you understand your customers and sales agents on a deeper level.
- **Completely Self-Serve** – Pay-as-you-go with no contracts or long-term commitments required.

www.datalot.com

**Product currently approved for Co-Op reimbursement
with Nationwide Insurance.**
Note: Contact vendor for current pricing.



Built For Insurance Agents By Insurance Agents

Real Results® was built with your insurance agency in mind. We know how hard it is to generate new business and keep policyholders on the books. That is why all of their products and services are specifically designed for you. They deliver on what they promise, and in a short period of time have expanded from solely setting exclusive appointments to providing an all-inclusive one-of-a-kind product, the *Internet Sales System*.

Real Results® Insurance Telemarketing Services are the best in the business and offer a unique approach to lead generation. Whether your company needs commercial lines or personal lines insurance telemarketing services, they have you covered.

What Makes Real Results® Insurance Telemarketing Services Unique?



Appointments to Fit Your Schedule - In-person or over the phone appointments set to work around your schedule in the parameters you define.



Prospects Are Primed to Buy – Implementation of the Wedge Technique uncovers buyer's pain points and give you a sales advantage.



More Options: Geography and SIC Filters – Give them the exact SIC code, size of business and arrears you want to write business in.



Customizable Plans for Each Agency – They work alongside your business strategy and they devise a plan that fits your agency's needs.

Take Your Business To The Next Level With Real Results



Exclusive Homeowners Live Transfers - Imagine if you could get the person shopping for your product on the phone in real time. Exclusive live transfer leads transfer potential customers to you, giving you a brief introduction, then letting you do what you do best, SELL! Let us help you today.



Personal Lines Engagement Program - The first of its kind! Real Results' proven method focuses on growing your current book of business through referrals, creating new business opportunities, and selling your most valuable asset... your agency!



Insurance Telemarketing Services - Our insurance telemarketing services are the best in the business. Built on integrity with the standard of excellence, we offer a unique approach to lead generation. Whether your company needs commercial lines or personal lines insurance telemarketing services, we have you covered.

www.rrleads.com

***Product currently approved for Co-Op reimbursement
with Nationwide Insurance.***

Note: Contact vendor for current pricing.



Highest Quality. Best Value. Winning Service.

HBW Leads® was established by insurance agents looking for a way to grow their agencies. These agents combined their sales expertise with the latest in calling technology for generating qualified insurance leads. HBW Leads has created a system that guarantees exclusive auto insurance leads of the highest quality, best value, and with winning service for insurance agents nationwide.

HBW Leads® call verified services are tailored for insurance agents seeking to grow their business. The team of script writers has developed a conversational format to generate scripts and leads insurance agents want. **HBW Leads®** has established procedures to verify an accurate and double verified lead development system and are dedicated to ensuring the accuracy of the lead to guarantee the highest quality.

Sample Insurance Lead Script - Carefully crafted scripts that bring you insurance customers. Auto insurance leads are available, as are other types of leads and multiple product categories. Every lead comes with a guarantee. View a sample of our lead script below and contact us to learn more.



Sample Auto Call Verified Script - To view a sample caller script used by HBW Leads telemarketers, [click here](#). Scripts will be customized for your agency and your name



Sample Auto Lead - [Click here](#) to view a sample auto insurance lead from HB Leads. Leads are delivered via email, through our Agent Lead Management System, or both.

Key Benefits

- **Auto Insurance Lead Generation** - **HBW Leads®** knows the insurance industry, and they know how difficult and expensive it can be to find a qualified auto insurance lead generation vendor to help build their customer base and grow your business.
- **Turn Auto Insurance Leads into Loyal Customers** - **HBW Leads®** telemarketers use carefully crafted scripts to seek out prospects for each business customer. Their quality assurance team guarantees that their representatives are courteous, helpful, and engaging so those leads are eager to talk with you - the auto insurance professional.
- **Training and mentoring** - **HBW Leads®** sales experts offer training to agents so they can maximize the effectiveness of their unique call verified leads. They also offer peer mentorships to active clients to help them write more quotes, earn new customers, and grow the bottom line.

Stop spending money and time on ineffective lead generation and call them today.

www.hbwleads.com

**Product currently approved for Co-Op reimbursement
with Nationwide Insurance.**
Note: Contact vendor for current pricing.



Commercial Insurance Sales Appointments Made Simple.

Lead Orchard® provides agents with high quality face to face appointments with local business owners and executives who have an interest in reviewing their business insurance needs. They schedule your appointments within the business classes you select in the area of your choosing. All prospects are instructed to have their current insurance documentation available for your review upon arrival.

Lead Orchard® guarantees if the business is not in the class you select, in the territory you choose, or if the prospect cancels the appointment – They will replace it



Mobile Access – Access lead information and communicate with their team on the go.



Introduction Emails – Introduction Email and Appointment Reminder sent to your prospective clients



Appointment Management System

– Online access to all activity. Appointment details are emailed and accessible in your account



Appointments On Your Schedule – The shared calendar will allow you to dictate the days you are available to run your appointments

- **Initial Appointment Setting Call** - They introduce themselves as calling on behalf of you and your agency, ask if they can provide them with a competitive quote, gather the necessary information and set a date and time for you to meet at their location.
- **Verify Appointment Details** - Once the appointment is set within their system, one of their team supervisors will call back to verify the decision maker, address and date and time of appointment.
- **Release Appointment Details** - Once the appointment is verified, they will release it to your account. This will also trigger an automated email that will send you the details of the appointment as well as send the prospect your introduction email.
- **Confirmation Call** - One business day prior to your appointment they will make a confirmation call on your behalf reminding the prospect to have their current insurance documentation ready for your arrival.
- **Information provided**
 - ✓ **Insurance renewal dates**
 - ✓ **Carrier info: Liability, WC and Business Auto**
 - ✓ **Number of locations, employees, and autos**
 - ✓ **Business and decision maker contact info**
 - ✓ **Appointment notes**

www.leadorchard.com

**Product currently approved for Co-Op reimbursement
with Nationwide Insurance.**

Note: Contact vendor for current pricing.



B2B Appointment Setting

THE PT SERVICES GROUP® specializes in appointment setting, business intelligence, and data collection for industries and opens the door to new prospects and new business with industry-leading appointment setting and data collection programs. Locally hired sales associates, experienced in interacting with C-level executives and high-level decision makers use proprietary techniques to break through screens and voice verify business intelligence. To drive growth, they work to craft a message that engages prospects and tells a compelling story about you and your services. Before you take the appointment, they arm you with business intelligence gleaned from calls and provide you with sales coaching on how to succeed in the unique scenario of a set appointment.

THE PT SERVICES GROUP® opens the door to new prospects and new business opportunities with industry-leading appointment setting and data collection programs. Their programs are driven by highly trained, in-house sales associates and a deep understanding of your business and goals. Backed by their award-winning culture, their entire company is built to help you grow and succeed.

More Than Sales Calls – The PT difference brings people, culture, and expertise to your growth goals.



Insights - Review and drive the latest best practices



White Papers - Exclusive breakdowns and observations from the frontlines of prospecting



Client Center - Client-only training on sales, growth techniques, and **Business to Business (B2B)** webinars

Key Benefits

- **B2B Appointment Setting** - **THE PT SERVICES GROUP®** appointment setting goes beyond traditional telemarketing and connects you with prospects that are interested in talking with an industry professional about the services you offer. Prospects meet target criteria and have agreed to meet with you. All PT appointments are exclusive by list and by call-type.
- **Data Collection** - **THE PT SERVICES GROUP®** associates conduct in-depth market research and data gathering. Data collection programs are customized to clients' unique needs and can be used to serve a variety of purposes, from data generation and data verification to audience research. Major corporations have used their data collection programs to update client's database of customers and prospects, verify data and complete profiles of customers and prospects by collecting missing information.
- **Sales Training** - **THE PT SERVICES GROUP®** has partnered with Dan Hudock, their Sandler Sales Coach, to prepare clients to succeed in the unique environment of a set appointment. With decades of sales experience himself and years of working with, Dan is an expert on sales opportunity. With his help, clients skip over the most common growing pains, entering meetings with the tools they need to succeed.

www.theptservicesgroup.com

**Product currently approved for Co-Op reimbursement
with Nationwide Insurance.**
Note: Contact vendor for current pricing.



Accelerate YOUR Agency Growth!

The Insurance Marketing Group® goal is to provide the highest quality, cost effective commercial insurance appointments for every one of their clients and to perform the service with integrity. IMG provides an innovative and cost-effective approach to new business development with guaranteed results with dozens of satisfied clients that have experienced significant ROI when utilizing their commercial insurance appointment setting service!

Why The Insurance Marketing Group?

IMG provides the highest quality...

- ✓ commercial insurance appointments.
- ✓ commercial insurance x-dates.
- ✓ independent agency mergers & acquisitions calls.
- ✓ new producer cold call training program.

IMG can accelerate YOUR agency growth because they know how to ...

- ✓ smile and dial, call agents average 25 outbound calls per hour.
- ✓ get past the gatekeeper and connect with the decision maker.
- ✓ pique a prospect's level of interest and engage in meaningful conversation.
- ✓ ask for the opportunity to quote and set highly qualified insurance appointments that lead to sales!

What separates them from the competition ...

- ✓ expert cold callers that specialize in commercial insurance appointment setting.
- ✓ coached by licensed insurance agents; there are very few objections they cannot overcome.
- ✓ works closely with clients and their underwriters to develop a unique and effective phone presentation.
- ✓ offers **EXCLUSIVITY**; do not do business with any of your competitors within a 30-mile radius.
- ✓ 100% TCPA Compliant.

The Insurance Marketing Group and your agency ...

- ✓ will customize your agency's campaign to suit your specific telemarketing needs.
- ✓ can call your target prospects before your competitors do.
- ✓ wants to be your business partner and accelerate your agency growth!

Additional Services

- Hot transfers, connecting an interested party directly to your designated cell or phone number
- TCPA compliant database supplied to your exact specifications
- Live call monitoring (where permitted by law)
- Call recordings (where permitted by law)
- Script development
- Daily reporting

www.theinsurancemarketinggroup.com

***Product currently approved for Co-Op reimbursement
with Nationwide Insurance.***

Note: Contact vendor for current pricing.



Business to Business TELEMARKETING

Call Tact Marketing® specializes in telemarketing for the insurance industry. Their Marketing Coordinators are trained to get around the “gatekeeper” and speak to the decision maker to gather current insurance information, look for a pain point and get you, the Producer, in the door. Most of their clients are averaging a 30% closing ratio. Tell them who, what, when & where...the specific demographics of who you want and can write, and they will build out a customized plan for you. All information gathered on behalf of your agency is proprietary to you. They absolutely do not share or re-sell information. As far as contracts go they offer a month-to-month plan.

No Contracts - No Outsourcing



TELEMARKETING! TALKING TO THE DECISION MAKER & GETTING YOU IN THE DOOR. Period. **Call Tact Marketing®** does not use predictive dialers, there will always be a live person right here in one of the 2 offices in the United States making calls on your behalf.

Works for You - Call Tact Marketing® customizes every marketing campaign for you, the client. You tell them who, what, when & where....the specific demographics of who you want and can write. All information gathered on behalf of your agency is proprietary to YOU. They absolutely do not share or re-sell your information. At any time you can request a copy of your database!

Why CallTact? - Most competitors ask for long-term commitments up-front. They go on a month-to-month basis. They BELIEVE IN THEIR SERVICE AND BELIEVE THAT YOU WILL SEE ENOUGH ACTIVITY TO WANT TO CONTINUE WITH THEM! Their philosophy is “never promise more than they can deliver and deliver more than they promise.” Marketing Coordinators are paid an hourly wage (with full benefits, including AFLAC) and only get a bonus once you renew. This keeps them focused on quality rather than quantity.

Your Success - Simply put if **Call Tact Marketing®** cannot do it....it cannot be done! They specialize in telemarketing for the insurance industry. Marketing Coordinators are trained to get around the “gatekeeper” and speak to the decision maker to gather current insurance information, look for a pain point and get you, the Producer, in the door. Most of clients are averaging a 30% closing ratio, it varies depending on the Producer.

You go to your appointments and do what you do best.....sell! We all know that insurance is not a one-call close. **Call Tact Marketing®** job is to get you in the door, it is your job to sell yourself and your agency and they want to be your Marketing Department and Time Management Specialists.

www.calltactmarketing.com

***Product currently approved for Co-Op reimbursement
with Nationwide Insurance.
Note: Contact vendor for current pricing.***



Qualified Commercial Insurance Leads

Northfield Leads® offers a unique experience and understands exactly how agents think regarding lead programs and can provide additional follow up techniques that have been field-tested over 30 years. Northfield knows what industries work for lead generation and which industries waste valuable time and resources. Their tele-prospectors are seasoned professionals who take their job very seriously. They understand that every lead must be followed-up with a second call to verify that the correct decision maker was contacted. They are directly responsible for helping their clients write over \$300,000,000 in new commercial insurance premium.

Why are Northfield's leads the best?

- **Unprecedented Exclusivity of Leads** - Northfield has instituted an exclusive county policy of "one agent one county". This means that after placing your order with Northfield Commercial Leads you choose to proceed with us, we will give you the opportunity to literally "own that county". Once a county is purchased you can continue to retain ownership of that county as long you continue being a client of Northfield Leads.
- **Qualified tele-prospectors** - They know how to hire and train. Their tele-prospectors are seasoned professionals who take their job very seriously. They understand that every lead must be followed-up with a second call to verify that the correct decision maker was contacted.

Find the missing piece to grow your agency.

- **Commercial Leads** – Gold Qualified Plan includes:
 - ✓ Customized calling lists in your target industries and geography - ***Free of Charge***
 - ✓ Telephone prospectors' vet all decision makers and provide full name and title
 - ✓ Decision makers will agree to discuss quoting on the Commercial Insurance
 - ✓ Provides current carrier
 - ✓ List as well as your leads are exclusive to you.
 - ✓ Discounts available on volume of leads ordered
- **Acquisition Leads** - Northfield Leads is the leader in direct marketing outreach to insurance owners who plan to sell their agencies quietly, discreetly, and without a business broker. Outbound calls to your targeted agencies are made by our highly trained tele-prospectors who have at least 5 years agency acquisition experience. Our experience covers all aspects of the relationship between buyers and sellers of the property and casualty insurance business.
 - ✓ Agency owners have agreed to discuss the potential sale of their agency.
 - ✓ They are not working with a broker or listed on an online/newspaper .
 - ✓ They must write for non-captive carriers - percentage listed.
 - ✓ They write for standard carriers - percentages listed .
 - ✓ They have a commercial and/or personal line book.
 - ✓ Life & Health and Financial companies can be included.
 - ✓ Phone and Face to Face appointments.
 - ✓ Comment section with any additional information or concerns owner provided.

www.northfieldcommercialleads.com

***Product currently approved for Co-Op reimbursement
with Nationwide Insurance.***
Note: Contact vendor for current pricing.



Commercial Lead Generation and Appointment Setting

Therrien Communications Inc® has specialized in telemarketing for insurance agents and the insurance industry throughout the country for over 15 years. A well-trained telemarketing team generates quality leads and is highly motivated to help expand and grow your business. The “Core Lead Generation Program” was developed by a former Nationwide employee and leading telemarketer trained by Nationwide in commercial and personal lines.



Commercial Leads/ Appointments - Looking for high quality Insurance leads and appointments at affordable prices?



Agency Acquisitions - Seeking to acquire an agency to grow your business?



Homeowner Referral Program - Grow your Homeowner book of business with this **INNOVATIVE NEW** program!

Commercial Telemarketing - Therrien Communications understands that obtaining quality leads is critical to your success, especially in these tough economic times. Marketing dollars you spend **must produce results**. That is why they guarantee quality leads and appointments for each telemarketing session and follow up on your X-dates at **no additional cost**.

Agency Acquisition - **Acquiring a quality agency is a great way to expand your business!** Experts estimate three out of four agencies in the US will transition in the next 10 years. The challenge is finding quality agency owners that are interested in selling **now!** Therrien Communications specializes in locating interested sellers for you based on your criteria.

Competitive Advantages

- **Adapting.** Strategies and scripts factoring product, region, and market
- **Flexibility.** Accessibility with coast to coast calling
- **Exclusivity.** Only represents one agent per region
- **Dedicated.** Assigned a telemarketer will execute and monitor the entire call campaign
- **Longevity.** Many of their customers have been with us for 10 to 15 years
- **Experienced.** Trained team of professional telemarketers have an average tenure of 8 years
- **Guaranteed.** Quality leads every month
- **Free.** Follow-up on x-dates to schedule appointments
- **Results.** Agents have seen results up to 60% client revenue on an annual basis.

www.therriencommunications.com

**Product currently approved for Co-Op reimbursement
with Nationwide Insurance.
Note: Contact vendor for current pricing.**



The Largest Commercial Exchange in the Known Universe

Bold Penguin provides a highly efficient exchange that enhances the connections between businesses, agents, and carriers—reducing friction in the buying process for everyone. Integrating technology with the human touch, they partner with insurers to make underwriting small commercial commercially viable. Their marketplace provides an opportunity to generate revenue by helping businesses in a network find insurance. Easily track all matched referrals and see the new revenue stream begin to take shape.

The Bold Penguin Exchange

Quote and Bind - One universal app for a combination of quotes.



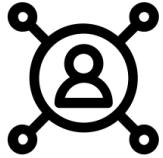
If you are an independent agent looking for an intelligent, single software solution that can be individually customized to how your agency quotes and binds commercial insurance – look no further. Fill out our Universal Application, carriers can then be ranked, coverage can be organized, and bindable quotes will appear consistently across your entire organization.

Prospect Exchange - Buy and sell prospects on your terms.



By being part of the Bold Penguin Exchange any agency, brokerage, carrier or insurtech can send or receive prospects. A two-step process ingests applications from a sending partner and delivers a verified customer to the receiving party. Bold Penguin operates the largest commercial insurance exchange that connects businesses, agents, and carriers to the right quote in record time.

Market Access - Expand offerings through direct and sub appointments.



By creating neutral infrastructure, the Bold Penguin platform can connect you to a broad and expanding list of carriers. Gain market access to top insurance carriers, like biBERK, CNA, Hiscox, Markel and others. You can leverage true sub-appointments with your own carrier credentials. Or leverage your direct appointments to quote and bind with your preferred carriers of choice. The world is your insurance oyster!

Robust APIs - Build the digital storefront of your dreams.



Bold Penguin works with some of largest and best-known commercial insurance carriers to deliver their insurance products into the right hands. By integrating your product(s) with the Bold Penguin solution a carrier can reach greater distribution in a controlled and predictable manner. The online or offline integration is highly customized to the technical capabilities of the BOP, Bond, Commercial Auto, Commercial Property, Workers Comp, General Liability, Professional Liability, or Cyber coverages.

Insurance Intelligence at **Bold Penguin** is the next evolution in their efforts to make commercial insurance faster, more efficient, and more informative. A team of data scientists, software engineers, and commercial insurance experts are leveraging ML and AI to solve new problems, including data enhancement, form extraction and policy language analysis. Solutions are embedded in the Exchange to accelerate quote and bind.

www.boldpeguin.com

Note: Contact vendor for current pricing.



Expect More Than Insurance Software

Ask Kodiak is a little different. They come from the insurance industry, and they know it well. This means: Total user control, including the ability to turn on/off or prioritize appetite on-demand. Simplified sign-up and sign-on. Full-featured APIs. No pesky salespeople. No hidden consulting projects for your budget dollars to suddenly fund and all with a clear ROI.

Ask Kodiak helps agents write more of the risks they want to write, faster while making insurance easier for everyone and having fun doing it. Going to a dozen websites searching Commercial Lines Appetite & Eligibility guides for all your carriers is not fun, so let's stop the madness.

Eligibility & Appetite For All Your Carriers. In One Place - Ask Kodiak gives you real-time visibility into carrier appetites for any particular risk. Filter by state, classification, risk-size, and more to instantly see product highlights, underwriting criteria, and more across your contracted markets and beyond. Because the information is provided by the carriers themselves, you can count on it being right. Every time.



Prequalification & Product Stats In An Instant - Carrier appetite changes all the time. Get instant visibility into up-to-the-minute class-level eligibility, benchmark premium amounts, product marketing material, and the key criteria underwriters look for. All without having to visit each individual website.



Share Appetite Within Your Agency - You can finally delete that spreadsheet you have been passing around with all your carrier eligibility. Kodiak Team Sharing - available as a paid upgrade to our free plan - allows your agency to catalog and search carrier appetite of your own. Brochures, underwriting notes, application workflow next steps, all of it. With Team Sharing, you will see not only carrier and wholesaler provided results, but also your own content.



Search, Analytics, And An API To Boot - Ask Kodiak comes complete with comprehensive dashboards so that you can understand what others in your agency have been searching for. Using our Appetite API, your team can integrate appetite search wherever they want. We call it *appetite as a service*. Put it on your management system. Build it into internal workflow tools. Your only limit is your imagination... What will you build?



Search Commercial Lines Appetite & Eligibility For All Your Carriers In One Place. For Free.

www.askkodiak.com

Note: Contact vendor for current pricing.

+ 134:23:454:12

FINANCIAL REPORT



LAST UPDATED
4 MIN AGO

CASHFLOW STATEMENT

INFORMATION
INTERVALS
MONTHLY
QUARTERLY
ANNUALLY

DISCLOSURES
REGULATORY
REPORTING
DATA SECURITY

DATA



SALES PER COUNTRIES



DATA



Agency Operations to improve, growth, retention & revenue



A Revolution for Independent Insurance Agents

Bridge™ is a complete communication suite for insurance agents that combines CRM, eSignature, text messaging, live website chat, web forms, automated marketing, advanced VoIP phone system and many other tools. Agencies typically pay separately for these, but Bridge combines them and lets agents easily document everything in their management system for E&O compliance.

Communications and relationships are the reasons Bridge was created. Bridge seamlessly consolidates an entire range of easy-to-use communication tools that allow people to connect in the way they prefer and build ever stronger relationships.

It's everything you need.



Phone System - Your phone system is the hub of your agency. Bridge includes the **enterprise-grade phone system** you need and gives you something no other system can: Quick and easy documentation of everything in your management system.



Marketing - Your agency is sitting on a gold mine of prospects. Bridge makes it simple to **market to them** and **watch the yield skyrocket**.



Automation - In every insurance agency, higher productivity equals higher profit. The **advanced automation** in Bridge can dramatically boost both. Automation. Productivity. Efficiency. More Sales. Better Service. All related, all fully covered in Bridge—these are just a few examples.



Key Performance Indicators (KPI)/Metrics - “If you don’t measure it, you can’t improve it.” Bridge gives you **actionable insight** into your agency’s data and performance.



Customer Relationship Management (CRM) - Great CRM gives you contact management. Bridge goes much further and provides **Super-powers to manage** and **interact with prospects and clients**. Don’t pay extra for a separate CRM system. Bridge consolidates your CRM, communications, marketing and much more.



Sales - Maintaining and growing your book depends on sales. Everything in Bridge is built to help you **dramatically boost sales** and gives you the right tools to boost and track your sales... And something equally important: E&O compliance made easy.

Bundle your tech deck and save hundreds of dollars each month, get new tools, and let a group of experienced agents teach your team what you need to do!

You've never seen anything like it.

www.kotter.net



What does Bundle and Save really mean?

Feature	bridge	Others (billed monthly)
Text Messaging	✓	\$100 per line, zipwhip
Chat (internal messaging)	✓	\$8 per user, Slack
Faxing	✓	\$17 per number, Efax
Power Prospector (advanced auto dialer)	✓	\$99 per user, Mojo
E-Signature	✓	\$25 per user, DocuSign
Auto Messaging	✓	\$75 5,000 contacts, Mail Chimp
Web Forms	✓	\$35 Typeform "essentials"
Video Proposal	✓	\$10 per user, Loom
Live Chat	✓	\$19 per user, Live Chat
Store and Share (secure document sharing)	✓	\$15 per user, Sharefile
Video Call / Screen Share	✓	\$15 per user, Zoom
VoIP Phone System	✓	\$35 per user, Ring Central, Premium
Integrated CRM	✓	\$25 per user, Salesforce, Essentials
Integration with Agency Management Systems	✓	???
<i>Agency Investment per month, per user</i>	\$55.00	\$470.00



Canopy Connect

Automates Personal Insurance Information collection.

Canopy Connect is building the infrastructure that powers best-in-class insurance experiences. Empowers consumers to gain value and convenience from their own data and enables businesses to support their customers securely and quickly.

Canopy Connect technology enables insurance agencies and innovators to deliver delightful, intelligent, and frictionless insurance services. Consumers want insurance to be personalized, seamless and easy, and they want basic control over their data. Insurance agents and agencies can instantly receive all the data they need to accurately assess a consumer's profile, without the tedious back and forth that takes place today. Insurance players need data to write better risks.

How it works



Sign up - You'll get your own unique link. Send prospects to your link to start collecting information instantly. You can also embed their widget directly into your website/app with a 1-line snippet.

Prospects import their insurance - Your prospects import their current insurance with a 1-click solution.

Check their insurance - Armed with data, you can focus on adding value and building a relationship. Access the data via their dashboard or API .



Instant Insurance Insights - Collect declaration pages, policy details, drivers, claims, contact info, documents and more - instantly and securely.



Accurate & Comprehensive - Access accurate information across all of your client's insurance policies.



Deeper Client Relationships - Armed with data, you can focus on delivering value to your clients instead of collecting information.

Ready to get started?

Start now or talk to them today.

www.usecanopy.com



Canopy Connect

Pricing

Simple, transparent pricing for teams of all sizes.

Pay as you go

\$0 to sign up and get started.
Unlimited data pulls for teams of
any size.

\$10 / data pull

- ✓ Declarations Pages (current and prior) across ALL personal lines
- ✓ Drivers (DOBs, Drivers Licenses, names)
- ✓ Policy Details
- ✓ Vehicle/Home/Asset Info across ALL personal lines
- ✓ Policy documents (Dec Pages, Verification of Insurance, Insurance Binders, Applications, ID Cards)
- ✓ Contact information (emails, phones, addresses)
- ✓ Claims history
- ✓ Free accounts for your team
- ✓ Unlimited data pulls

Month to Month

Up to 500 data pulls per month, for
teams of any size.

\$99 / mo

- ✓ Declarations Pages (current and prior) across ALL personal lines
- ✓ Drivers (DOBs, Drivers Licenses, names)
- ✓ Policy Details
- ✓ Vehicle/Home/Asset Info across ALL personal lines
- ✓ Policy documents (Dec Pages, Verification of Insurance, Insurance Binders, Applications, ID Cards)
- ✓ Contact information (emails, phones, addresses)
- ✓ Claims history
- ✓ Free accounts for your team
- ✓ Up to 500 data pulls per month
- ✓ 14 DAY FREE TRIAL

Enterprise

For our enterprise customers

- ✓ Declarations Pages (current and prior) across ALL personal lines
- ✓ Drivers (DOBs, Drivers Licenses, names)
- ✓ Policy Details
- ✓ Vehicle/Home/Asset Info across ALL personal lines
- ✓ Policy documents (Dec Pages, Verification of Insurance, Insurance Binders, Applications, ID Cards)
- ✓ Contact information (emails, phones, addresses)
- ✓ Claims history
- ✓ Tailored solutions
- ✓ Dedicated support



AGENCY REVOLUTION

Enterprise-level marketing automation for insurance agencies.

Today's insurance networks and associations differentiate themselves by the value and benefits they offer their members. Today's agents are serving modern insurance consumers who demands a drastically improved, personalized customer experience.

Agency Revolution has developed an enterprise-level marketing automation software that helps our member agencies easily communicate with clients and deliver effective marketing campaigns that retain clients and generate referrals.

Right Conversations. Right Time.

Sending a message at exactly the right time helps your member agencies earn the trust of their clients. Our marketing automation software helps determine the right message for the moment.



Triggered Communications - Use pre-determined triggers to communicate with clients at precisely the right time.



Account Rounding - Automatically identify coverage gaps to micro-target clients eligible for account rounding.



Quick Start Campaigns - Welcome kits, cross-sell, referral, and reputation management campaigns are ready to launch as soon as you are.



Staff Notifications - Automatically notify staff so they can communicate with clients in a timely and efficient manner.



Automation for Multi-Channel Distribution

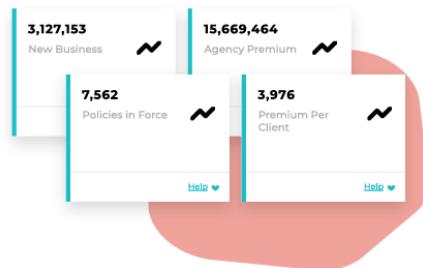
Effective marketing requires multiple touches, and in this modern era, businesses must meet consumers wherever they are. Agency Revolution enterprise marketing automation solution supports numerous communication channels—helping agencies stay relevant via email, direct mail, phone, text, and more.

Gain Enterprise Insights

Agency Revolution Enterprise Solution makes data-driven decisions for a network. Their enterprise solution lets a network monitor member agencies' business in real time using comprehensive business intelligence dashboards.

Unlock the Power of Data

Agency Revolution Enterprise Solution integrates with the insurance industry's leading management systems, enabling deep insights about each agencies' book of business to drive marketing campaigns.



Elevate™

Marketing Strategies for Insurance Agencies

Elevate™ combines modern websites optimized for SEO, a robust suite of digital marketing tools, and a dedicated marketing specialist to guide your journey. Agency principals and marketing managers gain a trusted advisor to maximize Agency Revolution tools and create marketing strategies for insurance agents that work.

Strategy & Guidance to Grow Your Agency

Building effective marketing strategies for insurance brokers and agencies requires experienced guidance. Their dedicated support team knows the insurance industry and is available to make sure you're getting the most out of your Agency Revolution solutions. Your marketing specialist works with you to personalize your marketing plan, combining the right tactics and tools to help you reach your goals.

Your marketing specialist helps you:



Maximize Your Suite - The platform includes several combinations of features and tools. Your marketing specialist will help you leverage every setting to get the most out of your product.



Analyze Your Traffic - Your marketing specialist will teach you to track web traffic using Google Analytics, Tag Manager, and Search Console. They'll also strategize ways to increase traffic.



Stay Updated – They are always improving their products. With a marketing specialist, you will always be among the first to take advantage of the latest features and upgrades.



Organize Contacts - Your contacts are precious. Your marketing specialist will help with list segmentation and ensure you start the right conversations with the right people at the right time.



Meet Your Goals – They will work with your marketing specialist to establish key performance indicators for your business and a personalized marketing plan.



Regular Check-ins - You and your marketing specialist will meet regularly to discuss and review your progress. Plus, they're ready to answer your questions whenever you need them.



Premium Content Library - Even the best insurance marketing strategy can't succeed without insightful and informative content. Elevate™ members can access a library of timely, relevant, and professionally produced videos, infographics, articles, and other content. Extra perks include customizable content, including branded newsletters, postcards, brochures, event invitations, logo designs, and business cards.

The Tools You Need to Build the Agency You Want

www.agencyrevolution.com

Note: Contact vendor for current IAN pricing.



Building Technology to Automate Growth

Zywave® helps grow your agency with automation solutions designed to simplify workflow and drive business results for Independent Insurance Agents. They offer unique value-adds and strategies designed to establish your industry expertise and make you an indispensable partner to your clients by providing risk management solutions, assisting with claims, negotiating renewals, and providing policy expertise for Independent Insurance Agents. While providing trusted guidance remains critical, today's insurance buyers expect more.

Employers are looking to their Agent to help them stay OSHA compliant, create safety manuals, establish a return-to-work program, and understand their total cost of risk. Deliver solutions to all these problems and more with Zywave's P&C solutions designed specifically to handle the complexity of commercial insurance so you can surpass your clients' expectations.

Are You a Full-Service Independent Insurance Agency?



Sales Cloud - Empowers your agency with world-class technology to automate your everyday tasks, so that you can deliver superior value to your prospects and clients. Compete on a whole new level by using a comprehensive suite of tools to generate newleads, nurture prospects and existing clients, and streamline servicing workflows.



Client Cloud - Delivers a high-impact customer experience by offering clients the centralized tools and content they need to solve their business's unique pain points. Whether clients need help with HR, compliance, employee training or another need, Client Cloud has the resources to deliver exceptional customer service year-round.



Content Cloud - Elevates your brand and builds your reputation by delivering high-quality, trusted content to clients and prospects. Leverage the content library available to deliver timely, personalized content that speaks to customers' individual pain points. All the content needed in one platform to help boost engagement and drive growth.



Analytics Cloud – Become a strategic business consultant and help clients evaluate claims, workers' comp losses, health plans and more. Show every client how invested you are in their business's success. Highlight your capabilities and deliver targeted, cost-saving advice by leveraging powerful reporting and analytical tools.

Break away from the mold of the traditional agent. The average agent meets basic needs when it comes to claims, plans and renewal negotiation. What about new exposures like cyber-attacks? New legislation? Pandemics? New tech giants can be focused on curing the pains of HR, such as benefits administration and small compliance issues, but lack the personal touch and insurance expertise that an independent agent provides.

Grow, prosper, and thrive as an Independent Agent.

www.zywave.com

Note: Contact vendor for current IAN pricing.

Sales Cloud

Streamline mission-critical workflows to fuel organic growth

Every agency needs a process to find and write new business, while providing the best service to renew current clients. Automate everyday tasks so you can deliver superior value to prospects and clients. Enable your agency with world-class technology to automate your everyday tasks, so that you can deliver superior value to prospects and clients. To maximize your technology investment, it is key that your solutions integrate and “talk with one another” to avoid repetition and potential errors. Connect your existing tech stack with Zywave’s industry-leading tools with an integration workflow that will help your data flow between applications.

Get in front of qualified leads and retain your existing clients by using technology to elevate your sales, renewals, and servicing. Enhance the entire process—all the way from prospecting to renewals—by using the game-changing tools available in the Zywave Sales Cloud. Compete on a whole new level by using a comprehensive suite of tools to generate new leads, nurture prospects, existing clients, and streamline servicing workflows.

- **Identify** - Arm producers with a data-driven growth platform that can consistently target new leads, promote your agency, and present your unique story to prospects and clients.
- **Grow** - Increase cross-selling, your teams’ productivity and reduce manual errors with a comprehensive quoting, proposal, and consulting solution to streamline your sales and renewal workflows.
- **Succeed** - As your business scales, access everything you need to manage your agency operations, sales, service, and renewal processes in one platform.

Sales Cloud Solutions

- **Marketing & Prospecting** - A comprehensive platform to simplify your entire sales process. Identify and market to new leads, coordinate all your communications with ease and take control of prospect meetings by delivering valuable insights and strategies.
- **Quoting & Proposals (CPQ)** - A dynamic, industry-exclusive platform designed to eliminate ineffective quoting and proposal workflows and enhance them with carrier-direct automation, insights, and consulting solutions.
- **Agency Management** - Transform the way you manage your benefits business by using solutions to automate and streamline your agency’s workflows, tasks, and activities. Reduce or eliminate redundant processes so your team can focus on growth, service, and retention.
- **Agency Operations** - Improve operational efficiency with technology designed to give you better insights into the performance of your benefits business. Gain a better understanding of your organization’s revenue stream so your agency can grow and succeed.

Featured Products

- ❖ **miEdge™**
- ❖ **Broker Briefcase P&C Edition**
- ❖ **Broker Briefcase Benefits Edition**
- ❖ **Zywave CPQ**
- ❖ **Brokerage Builder**

Plans

Grow faster with the right suite of sales solutions

Sales Cloud	Starter Suite	Business Suite	Performance Suite
Marketing & Prospecting			
Email Marketing Automation	✓	✓	✓
Lead Sourcing & Management powered by miEdge™	✓	✓	✓
Prospect Discovery Automation	✓	✓	✓
Prospect Presentations	✓	✓	✓
Quoting & Proposals (CPQ)			
Configure	✓	✓	✓
Price	✓	✓	✓
Quote	✓	✓	✓
Agency Management			
Account and Contact Management	✓	✓	✓
Activity and Workflow Management			✓
File Management			✓
Opportunity Management			✓
Plan Management			✓
RFP Management			✓
Agency Operations			
Commission Tracking			✓
Agency Insights Reporting			✓

Plans

Grow faster with the right suite of sales solutions

CPQ	Zywave CPQ	Zywave CPQ Premium	Quoting & Proposals (CPQ) in Sales Cloud
Configure			
Account Management	✓	✓	✓
All Plans Analysis - Small Group	✓	✓	✓
Compliance Testing		✓	✓
Medical Plan Comparison Chart-Small Group	✓	✓	✓
Medical Plan Benchmarking		✓	✓
Self-Funded Plan Analysis		✓	✓
Price			
Carrier Direct ACA Quoting	✓	✓	✓
Small Group Quoting & Proposals	✓	✓	✓
Quote			
Custom Agency Branding	✓	✓	✓
Enrollment Booklet Builder		✓	✓
Interactive Modeling		✓	✓
			Plus More

Client Cloud

Better Serve Your Clients and Your Bottom Line

A lot of agencies say they offer superior customer service, but what additional resources and tools do they truly provide? Deliver a high-impact customer experience by using Client Cloud to offer clients the centralized tools and content they need to solve their business's unique pain points.

Clients want more than an insurance policy—they want a trusted advisor. Discover consulting and fee-based service opportunities by providing clients the self-service resources and tools they need to stay compliant, manage risk and build a better workforce. Client Cloud has the resources you need to deliver exceptional customer service year-round.

- **Build** - Deliver industry-leading resources and tools directly to your clients, keeping them happy and allowing you to focus on new business.
- **Expand** - Provide clients the compliance, training, people and risk management tools and services they need to avoid costly lawsuits, claims, and fines.
- **Distinguish** - Increase retention by helping clients reach and engage employees with a paperless solution to their enrollment and onboarding experience.

Client Cloud Solutions

- **Education & Training** – Elevate customer experience with industry-leading education and training platforms. Provide clients access to an online portal to create a one-stop shop for all the content, tools, and resources they need. Expand your value one step further by offering a customizable learning management system.
- **People Management** - Extend your value by offering clients tools centered around their biggest investment—their employees. Provide them with the HR assets and resources they need to do their jobs more effectively, along with access to a team of experienced HR professionals who are ready to answer their pressing business questions.
- **Enrollment & Onboarding** - Become an essential part of clients' benefits enrollment and onboarding process. Provide them a benefits administration portal and customized HR information system that simplifies the election process and saves them time.

Featured Products

- ❖ [HR Connection](#)
- ❖ [MyWave Client Portal](#)
- ❖ [Wrap360™](#)
- ❖ [HR Hotline](#)
- ❖ [Zywave Learning](#)

Plans

Engage your clients with the right suite of solutions

Client Cloud	Starter Suite powered by HR360™	Business Suite	Performance Suite
Compliance & Risk Management			
Content Library	✓	✓	✓
OSHA Log	✓	✓	✓
Compliance Apps		✓	✓
Notices		✓	✓
Client Self-Service Portal	✓	✓	✓
Learning Management System (LMS)		✓	✓
People Management			
HR Apps	✓	✓	✓
HR Hotline		✓	✓
Employee Handbook Builder		✓	✓
Enrollment & Onboarding			
Benefits Administration			✓
HR Information System			✓

Content Cloud

Harness the power of content to drive growth

Elevate your brand and build your reputation by delivering high-quality, trusted content to clients and prospects. By leveraging the unparalleled content library available in the Zywave Content Cloud, you deliver timely, personalized content that speaks to customers' individual pain points.

Whether you are a P&C agent or a benefits broker, the Zywave Content Cloud has all the content you need in one easy-to-use platform to help you boost engagement and drive growth. Integrate your content with the insurance industry's most expansive content library. Leverage our easy-to-use content management system to build expertise, save time and deepen client trust.

- ✓ **Educate** - Demonstrate your expertise with targeted content and your own agency materials, allowing you to organize everything you need, in one easy-to-use platform.
- ✓ **Consult** - Showcase mastery across all the markets you serve with the largest customizable content library available and distinguish your brand from the competition.
- ✓ **Integrate** - Set your agency up for success with an integrated content solution that delivers content the way you want, in the systems you already use.

Content Cloud Solutions

- **Employee Benefits Content Packages** - Empower your team with the industry's largest library of employee benefits resources. Complete with videos, guides, checklists and more, there is a solution for every HR, wellness, employee benefits and compliance concern.
- **P&C Content Packages** - The industry's widest library of P&C resources designed by industry experts to cover any commercial insurance issue, including risk management, workers' comp, safety, and compliance.
- **Content Access** - Find the resources you are looking for faster with a comprehensive set of features designed to help you get the most out of your content.
- **Content Management** - Keep all your organization's content consolidated and organized. Brand, administer and customize your content with tools designed to help your agency succeed.
- **Producer Training Module** - A complete sales training program designed to help new producers learn best practices for selling in the insurance industry. Complete with videos, resources, and a progress tracking dashboard, this is the solution you need to take your sales team to the next level.
- **Third-party Content Integrations** - Access content in the software solutions you already use to increase utilization and efficiency. Automatically display content in your existing CRM systems and discover the most relevant resources based on specific account data.

Featured Products

- ❖ **Broker Briefcase Benefits Edition**
- ❖ **Broker Briefcase P&C Edition**

Plans

Pick the right solutions suite to provide consolidated content & education

Content Cloud	Starter Suite	Business Suite	Performance Suite
Content Packages			
Employee Benefits	Pick 3		
State & Federal Compliance		✓	✓
Human Resources		✓	✓
Wellness		✓	✓
Employee Communications		✓	✓
Employee Benefits Broker Insurance Insights		✓	✓
Employee Benefits Premium Content		✓	✓
Property & Casualty (all include ACORD Forms)	Pick 3		
State & Federal Compliance		✓	✓
Human Resources		✓	✓
Personal Lines		✓	✓
P&C OneSource™*			<i>Available for Purchase</i>
Employee Safety Communications		✓	✓
Risk Management & Loss Control		✓	✓
Commercial Coverage Education		✓	✓
P&C Broker Insurance Insights		✓	✓
P&C Premium Content		✓	✓
Content Access			
Smart Content delivery	✓	✓	✓
Content Groups	✓	✓	✓
Content Exploration	✓	✓	✓
Content Management			
Agency Branding	✓	✓	✓
Agency-Owned Content	✓	✓	✓
Customizations	✓	✓	✓
Administrative Tools	✓	✓	✓
Producer Training Module			✓
Third-party Content Integrations			✓

*Available for purchase in the Business and Performance Suites

Analytics Cloud

Claims & loss analytics made easy

Become a strategic business consultant for clients. Help clients evaluate their claims, workers' compensation losses, health plans and more by using the solutions available in the Analytics Cloud. Show every partner—not just your top clients—how invested you are in their business's success. Highlight your agency's analytics capabilities and deliver targeted, cost-saving advice by leveraging powerful reporting and analytical tools.

Identify - Using products in the Analytics Cloud, you can become a proactive partner by:

- Showing data to help clients stay competitive in their industry
- Pinpointing cost drivers and developing strategic recommendations
- Eliminating redundant data entry so you can focus on what you do best, providing guidance to your clients

Implement - Identifying opportunity areas is one thing, but utilizing the products within the Analytics Cloud allows you to easily put plans into action by:

- Showing your clients their data compared to the industry Demonstrating how and where you are enhancing their business

Analytics Cloud Solutions

- **Decision Master® Warehouse + PlanAdvisor®** - Help clients control their rising health care costs with data claims analysis. Easily identify health plan cost drivers and show clients how they benchmark within their industry. Ease their concerns with the ability to model potential plan design changes so their employees can get the most out of their health care benefits.
- **ModMaster®** - Powerful mod-analysis at your fingertips. Save time with quick import functionality and structured reporting that will help pinpoint cost drivers and enable you to provide strategic guidance to help clients lower their mod and save money.
- **RALLE® Warehouse** - Identify and quantify P&C cost-saving opportunities for clients. Easily uncover root causes of claims to provide strategic loss control actions backed by easy-to-use reporting. Track cost savings over time to continually demonstrate your expertise and value.

Key Features

- **Dig Deep Into Your Clients' Health Plan Data** - Reveal hidden health care costs, model potential plan design changes, and deliver targeted cost-saving solutions using the powerful tools in Decision Master Warehouse + PlanAdvisor.
- **Position Yourself as a Mod Expert** - Open prospects and clients' eyes to the impact of the mod and identify cost drivers and trends using the sophisticated analytics in [ModMaster](#).
- **Deliver P&C Cost-Reduction Strategies** - Discover root causes of auto, property, workers' compensation, and general liability claims with the easy-to-use reports in [RALLE Warehouse](#).

***Products currently approved for Co-Op reimbursement with
Nationwide Insurance***

Note: Contact vendor for current pricing.



The modern solution for the insurance application and renewal process

Indio™ turns traditionally cumbersome insurance application into a simple, Turbo-Tax like experience. Indio “smart” form technology digitally enhances insurance forms and applications, making the application and renewal experience fast, simple, and easy, saving you and your clients’ time and money while minimizing E&O exposure.

Why Digitize Your Application and Renewal Experience?



Increase Efficiency and Time Savings – Reduce keystrokes and time wasted by agents and customers when navigating separate individual applications.



Keep Your Customers Happy and Renewing - Create a simpler application experience by reducing the total number of questions your customers are required to answer and provide them a faster application and renewal process.



Minimize E&O Exposure – Eliminate duplicate data entry and reduce the opportunity for inaccurate data and Errors & Omissions exposure.



Win New Business – Arm Producers with a simplified application process for their customers and prospects, making it easier to generate cross-sell opportunities, round out accounts, increase customer retention and referrals.

How A “Smart Form” Works



Automapping - With “smart” forms, answers to similar questions auto-map from one form to another, alleviating the need for you and your clients to rekey the same information repeatedly.



Customizable Forms - The “smart” forms come with customizable technology, allowing you to hide or mark specific questions required within an application, making the experience personalized and simpler for your customers.



Conditional Questions - “Smart” forms come with pre-built conditional questions, which means a question answered “Yes,” will have follow up questions appear, while a question answered “No”, will not have additional questions appear.

A Modern Technology Platform to Future-Proof Your Business



Bank-Grade Security - All customer data is protected using AES-256 encryption behind SSL with regular security audits. View Indio’s full security report at www.useindio.com.



Cloud-Based Platform – Indio is built of Amazon’s AWS cloud to provide the maximum reliability and scalability. Indio’s always-on platform integrates with your AMS to ensure that data is always kept up to date.



Data Standardization - The intake engine takes client data from uploaded spreadsheets, supplemental forms, or AMS exports, sanitizes the data and then stores it in a clean structured format where you and your clients can easily access it.

Find out why agents everywhere are talking about Indio.

www.useindio.com



Handle your small commercial book with AI

Relativity6™ provides agencies with a data enrichment platform that provides predictability during both the sales and renewal processes and introduces closing probabilities for current opportunities that takes the guesswork out of the equation. Their platform gives you a comprehensive AI-backed client need detection system with tools built to help your Account Executives and Producers have better client interactions and close more account rounding opportunities.

Insurance agents and brokers can't be replaced by chatbots

Despite being key advisors to people and businesses, agencies aren't always able to provide all customers with total coverage all the time. In the era of AI, **Relativity6™** can help agents and brokers find opportunities to cross sell and better engage their clients and find hidden areas for growth.

Intelligent Renewals and Up Sells for your Small Commercial Accounts

- ✓ **Quickly Prioritize** Small Commercial Accounts up for Renewal
- ✓ **Send Automated** Emails with Intelligent Upsell Offers
- ✓ **Send Industry and Behavior specific** reach outs with Intelligent Up Sell Offers
- ✓ **Connect to their API** directly or use their account servicing platform.

Service Center in a Box and API Features



Automation - Reduce workload for account servicers, and producers with automated Renewal and Upsell campaigns



Renewal Scores - Score upcoming Renewals as Low, Medium or High by Risk of Not Renewing



Small Commercial Up Sell - Recommend the right thing at the right time based on AI and Inferred Industry Codes



Insights - AI powered industry specific insights help with customer engagement and increase renewal and up sell conversion rates.



Customer Lifetime Value - Predictions are optimized to increase customer lifetime value.

What they do!

Relativity6™ strives to redefine the standard of excellence in delivering AI solutions and enable insurance agencies and brokers to accurately predict customer behavior and anticipate their needs. Agencies can now anticipate client needs ahead of time and cross sell policies that bring in more revenue and reduce risks to clients and the agency through better service and customer engagement.

Top agencies and brokers use Relativity6™

www.relativity6.com



Affordable, expert IT services for Independent Insurance agencies.

Archway believes your insurance agency's technology should give you a competitive advantage. Their team of insurance technology specialists allow them to advise, plan, implement and support your agency's specific technology vision and mission and want to have you use technology to grow your book of business.

Archway's goal is to help Independent Insurance agencies get the most out of their computer hardware and software, with simple fast affordable and proactive computer support to help eliminate IT problems before they can negatively impact your agency with a no-cost IT assessment to help streamline technical operations and goals.

Insurance for your computer systems.



24x7 Remote Help Desk Included - Unparalleled, secure Managed IT Services, strategically designed and supported by a team of proven, experienced IT engineers and technical staff-24/7/365.



IT Security & Compliance Management - When data breaches can occur, they can result in costly financial and sales data losses, as well as leaks in private client information. They make sure security regulations are in place to prevent these scenarios.



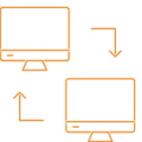
Cloud/Amazon Web Services - Free your business from technology management to focus on insurance. Allow Archway to manage your complete desktop environment from the Amazon Cloud.



VOIP - IP-enabled phones connect to the Internet that manages calls, voicemails, and other functionality. Contact them to learn how they can lower your VOIP bill and integrate it with your management system.



Virus/Spam/Ransomware Protection - Archway Computer techs can help with anti-spam protection and helping employees understand how to spot phishing scams.



Backup & Disaster Recovery Services - Don't wait for the worst-case scenario; Archway Computer IT technologies make it easy to back up & archive data, so you can rest easy knowing your agency's information is protected.



Single monthly fee for support - They truly partner with clients, allowing them to focus on their clients by lowering the time on task, system downtime, and the total cost and complexity of IT support services in general.

Technology Your Insurance Agency Can Depend On

www.myarchway.com

Note: Contact vendor for current pricing.



Together we can find new ways to help you and your company succeed.

ADP® gives access to scalable payroll and HR tools to help you be more strategic, so you can broaden and deepen the impact of your business. ADP's innovative solutions are designed to help you meet some of your most challenging needs and help you focus more on what you are good at – growing

Payroll and HR solutions that meet your needs



Payroll - Fast, easy, accurate payroll and tax, so you save time and money.



Time & Attendance - Track hours worked, manage time-off requests, and seamlessly integrate with payroll.



Talent - From recruitment to retirement, getting the very best out of your people.



Benefits - Employee benefits, flexible administration, and business insurance.



HR Services - From best practices to advice and HR consulting.



Outsourcing Options - Focus on what matters most by outsourcing payroll and HR tasks, or join our PEO.



Payroll, Taxes, & More For Small Businesses!

Run Powered by ADP® is designed to make your small business payroll quick and easy. With a streamlined process and powerful technology, you'll complete payroll in no time. RUN offers you the freedom, flexibility, and convenience of managing HR and payroll anytime, anywhere. RUN's mobile solution helps make processing payroll, filing taxes, and addressing HR compliance issues a breeze with this solution's automated services. Get back to running your business and taking care of your team.



Run payroll and file taxes in just a few easy steps.



Pay your employees by check, direct deposit, or pay-card.



Run payroll by phone, web, or mobile app.



Get 24/7 payroll support from ADP experts.

See how simple running payroll can be

www.adp.com

Promotional pricing offered through Insurance Agency Networks' relationship with ADP.



Always Designing
for People™

ADP® Payroll & HR Packages

When it comes to your small business, one size does not fit all

How you choose to manage your back-office burden can pull your focus away from reaching your longer term business goals — or it can bring you closer to achieving them. ADP offers a range of innovative solutions that help you manage the administrative side of your business.

	Features	ADP® Essential Payroll	ADP® Enhanced Payroll	ADP® Complete Payroll & HR Plus	ADP® HR Pro
Payroll, Taxes and Compliance	Payroll: Online, Phone, Mobile	■	■	■	■
	24/7 Customer Service	■	■	■	■
	Tax Filing	■	■	■	■
	Electronic Reports	■	■	■	■
	Employee Access® (Portal)	■	■	■	■
	New Hire Reporting	■	■	■	■
	Payroll Delivery	■	■	■	■
	General Ledger Interface (GLI)	■	■	■	■
	RUN & Done® (Automatic Recurring Payroll)	■	■	■	■
	Direct Deposit	■	■	■	■
	Wisely® Direct Debit Card ¹	■	■	■	■
	ADPCheck™		■	■	■
	Poster Compliance		■	■	■
	State Unemployment Insurance (SUI)		■	■	■
	Wage Garnishment Payment Service		■	■	■
	Check Signing and Stuffing		■	■	■
People Management	HR Newsletter & Tip of the Week	■	■	■	■
	State & Federal Resources	■	■	■	■
	Employment Verification	■	■	■	■
	New Hire Paperwork	■	■	■	■
	New Hire Self-Onboarding	■	■	■	■
	Employee Discount & Wellness Programs	■	■	■	■
	ADP Marketplace (Digital HR Storefront)	■	■	■	■
	ZipRecruiter®		■	■	■
	Background Checks		■	■	■
	HR HelpDesk (Live Support)			■	■
	Employee Handbook Wizard			■	■
	HR Toolkits			■	■
	Compliance Database & Updates			■	■
	Job Description Wizard			■	■
	HR Forms and Documents			■	■
	HR Fundamentals Training			■	■
	HR Tracking			■	■
	Alerts and Notifications			■	■
	Document Vault			■	■
	Proactive HR Support Team				■
	Employee Assistance Program				■
	Employee & Employer HR Training ²				■
	Business/Marketing Tools and Live Advice ³				■
	Upnetic Legal Services ⁴				■

¹ Wisely Direct is a prepaid account offered directly to consumers by ADP (it is not an employer-offered pay card program).

² Employee & employer HR training provided by Upnetic®, a third-party provider

³ Business/marketing tools and live advice provided by BizPro, a third-party provider

⁴ Legal services are provided by Upnetic Legal Services powered by Legal Club® (of America), a third-party provider.

ePayPolicy

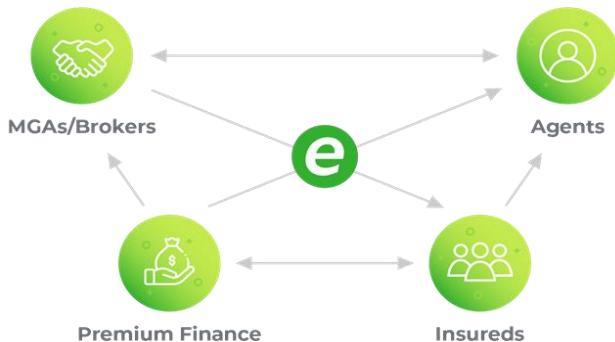
Digital Payment Solution for Independent Agencies

ePayPolicy™ is the simple, seamless solution for independent agencies to collect and send funds across the industry. Agencies easily collect credit card and ACH payments from insureds using their own mobile payment page. Accepts credit card and ACH payments online. Speed up receivables, bind policies faster, and provide an experience your clients will love.

ePayPolicy networks' key benefits for your insurance agency

- Branded payment page with unique URL
- Basic and custom payment page options starting at \$20/month
- Quick and easy setup with no startup fee or contract needed
- All 4 major credit cards accepted, including American Express

ePayPolicy is much more than a simple payment processor.



- Integrates with [popular management systems and client portals](#) to gain access to additional features.
- Track funds, manage users and void payments within the ePayPolicy dashboard.
- Send funds across the industry by utilizing [payables feature](#)
- Stay in compliance and setup both Trust and Operational accounts to handle inbound funds.

Select one of the digital payment page options below to get started.

Basic

The easiest way to get rid of those paper checks!

\$ 20 per month

Company branded payment page
Online dashboard to track & reconcile funds
Unlimited users
Unlimited transactions
Funding in 1 – 2 business days
Accept all major credit cards and ACH payments
3.25% on credit cards, \$3 on ACH, and \$25 for chargebacks

Custom

Give your payment page a little somethin' extra.

\$ 50 per month

All Basic Plan features, PLUS:
Upgrade or change anytime
Payment customization options:
Custom colors
Add attachments
Offer recurring payments
Add a "Disclaimer Agreement"
Add a "Custom Disclaimer"
Custom "Notes" text
Add popup images
Add Custom Form Fields

Integration

Get the advanced sophistication you and your team require!

[Chat for details](#)

All Basic & Custom Plan features, PLUS:

Due invoices and Paid invoices auto-sync to your management system in real time

[*Auto Pay](#)

[*Batch Payables](#)

[*Invoice Notifications](#)

[*Interactive Voice Response](#)
[Current Integrations](#)

[*Only Available On Certain Integrations](#)

Ready to Speed Up Receivables?

www.epaypolicy.com



Angela Adams Consulting

Shining the light to your success

Insurance Agency Consulting Firm

Angela Adams Consulting™ is a national consulting firm specializing in CSR, Accounting, Training, and Consulting services for Independent Insurance Agents. Trusted Customized Solutions, Real-World Approach, utilizing a strategic and practical approach, to achieve real results that increase productivity at every level. Staff, training programs, and highly efficient workflows provide the tools that agencies need to be successful. Whether it is short term assistance or a long-term partner – Angela Adams Consulting is the best solution!



There is no overhead, no minimums, no set-up costs, no interviews, no personnel files, no paid breaks... just quality work when you need it, from a firm you can trust.



Bookkeeping - As the premier provider of monthly accounting services, they offer a robust, a-la-carte menu with a variety of services that meet the needs of insurance agencies allover the country.



Processing - All aspects of client servicing from Certificates of Insurance, Evidence of Property, Auto ID Cards, Binders, Policy Checking & Processing, Endorsement Checking & Processing, Claim Filing & Updating, Notice of Cancellation Processing, Ordering Loss Runs, Download Reports and Assign, Download Processing, to Processing Incoming Mail.



Account Management Services - All processing services plus Rating & Quoting, Submissions, Proposals, Endorsement Ordering, Audits, Renewal & Expiration Lists, Master Certificate/EPI Creation, Billing & Invoicing, & Researching Past Due Suspense.



Special Projects – They are there to help your agency with any special projects such as Cleanup and Backlog, Disaster Recovery Claims Handling & assisting with Data Entry during management system conversions.



Short Term Assignments - Short staffed? Let them help you when you need it the most, allowing you to stay focused on your goals and objectives and make the best strategic decisions for your agency.



8 Hour New Hire Training - 8-hour training program instills confidence in employees and management that training is conducted according to procedures, industry best practices, and minimizes the strain on existing staff thus maximizing the investment in new employees!



Staff Assessments - Tools that provide insight into how well employees are leveraging the software to achieve maximum efficiency and accuracy. Results will bring light to where you are today so that you can focus on what will make the biggest impact on your success in the future.

www.angelaadamsconsulting.com

Note: Contact vendor for current pricing.



Service as unique as a two-dollar bill

Capital Premium Financing™ is a specialty lender that provides financing for certain types of insurance premiums paid by commercial enterprises. CPF has built an excellent brand name and reputation for service and product innovation. Since its organization in 1988, CPF has sustained average annual growth rates of over 30%. The founder continues to serve as its CEO and to manage day-to-day operations in conjunction with a highly qualified team of professional financial managers comprising combined commercial banking, investment portfolio management, and financial institution regulatory experience of over 150 years.

Capital Premium Financing™ is recognized as a leader in service and trusted partner in the premium finance loan industry and strictly complies with all laws, regulations, and contractual obligations that pertain to their company.

For the Agency

- **Increased Revenue** – With exclusive profit-sharing programs, financing insurance premiums has never been so profitable.
- **Lower Cancellations** – With exclusive cancellation prevention programs, financing insurance premiums has never been so efficient.
- **Unique Service** – With an exclusive service set and one point of contact, financing insurance premiums has never been so simple.

Capital Premium Financing™ Advantage - *Commissions not available in every state.*

- **Contract Funding™** - additional revenue without affecting the insured's APR.
- **AFP FlexPlan™ profit sharing** – revenue rate based on prime, interest compounded monthly, full liquidity and monthly statements.
- **AFP MaxPlan™ profit sharing** - agency shares portfolio return, detailed monthly statements, annual contribution, and quarterly withdrawal options.

Capital Touch™ advantage.

- ✓ 15-day pre-due date monthly bill
- ✓ 10-day post due date notice of intent to cancel
- ✓ 10-day, 5-day, 3-day pre-cancellation calls to insured
- ✓ 3-day notice of intent to cancel fax/email to agency

Agency service “your way”.

- ✓ Phone (live help on quotes)
- ✓ Email (forward your quote from market)
- ✓ Online Quotes
- ✓ ESignatures

Want to grow your agency's revenue?

www.capitalpremium.net

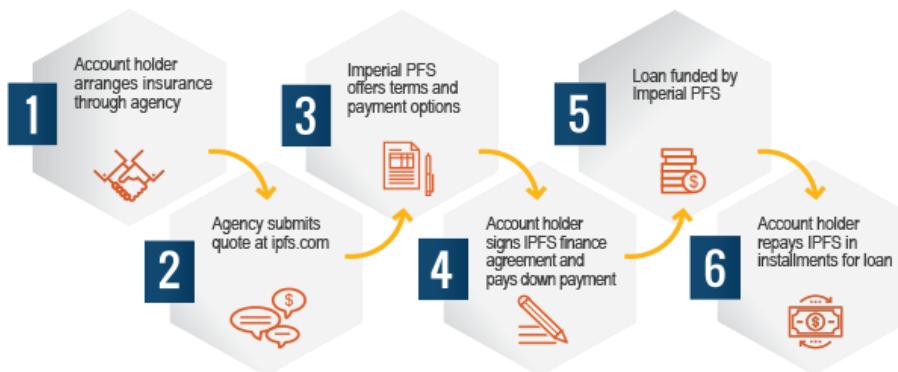


A Strategic Partner in Premium Financing

IPFS® is the leader in commercial premium financing by offering benefits to agencies including, immediate commission collection, superior account receivable ratios, reduced billing expenses, enhanced service for clients and increased annual income. Insurance agents and agencies partner with Imperial PFS to offer financing solutions to business owners.

IPFS® goal is to provide a beneficial service to insurance agents to give business owners the commercial insurance coverage they need. They serve as an indispensable partner, ensuring a seamless premium finance experience for both agents and account holders.

IPFS approval process is straight forward:



Types of Coverage:

- Property & Casualty
- Commercial Auto
- General Liability
- Business Owner's Policy
- Professional Liability
- Trucking
- Errors & Omissions
- (BOP) Personal Lines

Technology:

- IPFS Connect and a mobile optimized website allows Customers to access their account and make payments anywhere
- eForms and Text alerts
- Credit card and ACH down payment
- Agent and insured web portal
- Agency dashboard on ipfs.com provides insight into insured activity

Integrations:

- IPFS QuoteLink® - Pre-built integrations with agency management systems
- IPFS CustomLink® - Third-party integration tools for agencies that prefer not using eSign
- IPFS DataLink® - Data reporting technology
- IPFS eCommLink™ - Integrates using IPFS CustomLink with additional payment processing

IPFS® combines superior technology and more than 40 years of legendary Customer service to provide a seamless premium finance experience. They provide a personal Account Executive that works closely with insurance agents to provide custom solutions for business owners.

Learn the Benefits of Partnering With IPFS

www.ipfs.com

Lending Provider Landscape

	Bank	SBA	Specialty Loans	Credit Cards	Cash Advance Merchant loans
Minimum Fico Score	700+	620-640	550 (discount at 720)	550+	Only Option for Low Fico
Years in Business	Difficult for Startups	2 Years	2 Years or relevant industry experience	Based on Personal Credit	Not an issue
Rate (%APR)	6-13%	8-10%	10-19%	14-29%	25-98%
Fund delivery Time	60-90+ days	60-90+ days	24 hr. terms 5days funding	1-5 business days	Next Day
Terms	Up to 25 years	7-10 Years	1-7 Years	Use only as needed	Varies Widely
Collateral/Guarantee	Business & Personal Guaranteed Required	Business & Personal Guaranteed Required	Commissions as collateral	Personal Guarantee Required	Personal Guarantee Required
Documentation	Lots of paperwork required	Hefty paperwork required	Streamlined documentation	Little paperwork required	Very little paperwork required
Fees	Strick requirements; Possible annual fees	2.75 - 3.5% Possible annual fees	2-5 - 6% One-time, upfront fees	Many fees Steep fees for non-performance	Variable Daily or weekly; front or back-end fees
Bankruptcy	No	No	Yes	No	Varies
Pre-Payment Penalty	Possible	Possible (depends on terms)	No	No	Varies
Partial Buyout	Yes	No	Yes	Not Applicable	Not Applicable
Details	Want well established business; If you qualify they are less strict about how you spend the money,	Down payment required; Must have \$1 for every \$3 loaned; Must fully document spending.	Flexible paydowns, IO's, Steps; Customized lending; Partner buyout	They will pull your personal credit to open the loan, but reports can be on your business credit.	Buyer beware! Read your terms and conditions; Not all structured the same.



OakStreet Funding® provides financing to evolve your agency!

Capital for your Insurance Agency

Your business is challenged with growing throughout its life cycle. Whether you are contemplating strategies to reach the next level, expanding to new markets, launching a new acquisition model, or positioning your business for a future sale, you may need capital to meet your goals.

Oak Street Funding® specializes in providing insurance professionals with capital based on your biggest asset – future revenue. Take advantage of cash-flow loans to launch your initiatives without borrowing against your personal assets. They can help you:

- Hire and recruit
- Consolidate business debt
- Enter new markets
- Upgrade technology
- Fund a partner buyout
- Grow through acquisition
- Invest in marketing strategy
- Initiate a succession plan

Financing

- Flexible structures (non-SBA loans)
- Terms up to 12 years
- Loans/lines of credit up to \$20 million

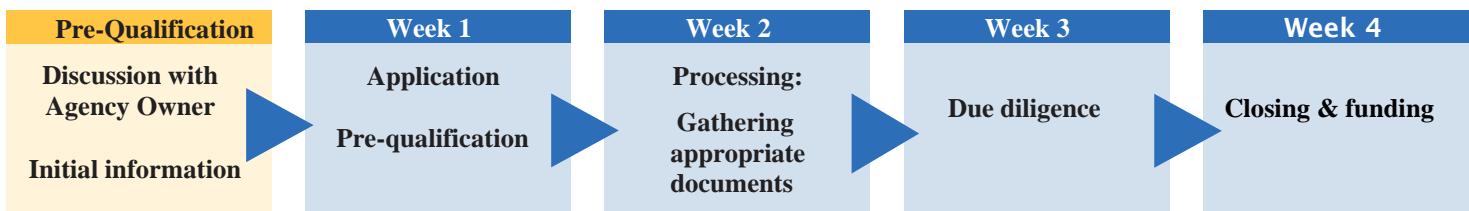
Uses of Capital

- Mergers and acquisitions
- Successions and owner buyouts
- Working capital
- Business debt consolidation

In-House Loan Processing and Servicing

- We are a direct, non-SBA lender and handle loan processing, underwriting, and servicing in our Indianapolis, Indiana office.

Typical Process and Timeline



Insurance industry professionals across the United States have benefited from hundreds of millions of dollars in loans from Oak Street, a direct, non-SBA lender. Their unique cash-flow analysis, fast turn times, insurance industry knowledge and innovative technology align to meet the growing demand for financing in the insurance space.

Have questions? Talk with their experts for more information.

www.oakstreetfunding.com



WESTFIELD BANK

Financing and answers to help you grow your business

Westfield Bank's™ vision was to create a better community bank and have done this in several ways. They are more flexible and faster than bigger banks and deliver a more personalized service and provide financial services at lower costs. Lending decisions are made locally. A team of agency banking experts with the experience and know-how to help you meet your insurance agency's goals, realize that every agency is unique and that only after an expert consultation can a solution be developed that is right for your specific needs.



Agency Loans - Leverage the power of your agency

- Acquisition and perpetuation
- Transition of ownership
- Non-compete buyouts
- Agency office building financing
- Working capital lines of credit
- Producer loans



Premium Financing - Key Benefits for Agents

- Funding within 24-48 hours of a signed finance agreement
- Multiple payment options and customized payment plans
- Anytime, anywhere real-time quoting and account information
- Compelling revenue-sharing opportunities



Deposit Solutions - Key Benefits for Agents

- Service across the U.S.
- Remote Deposit Capture enables your agency agencies to scan and deposit checks directly from a personal computer
- Access real-time balance and detailed transaction information anytime from anywhere
- Reassurance of working with the same dedicated team member whenever you call

Expert Service for Nationwide Insurance Agents

Commission-Based Streamlined Loans.

- Loans from \$250,000 - \$2,000,000
- Maximum Loan amount is such that your monthly commissions received are 5 times your payment
- Limited underwriting outside of commission statements
- Commissions must be deposited into Westfield Bank account
- All loan payments deducted from Westfield Bank account
- Minimum balance of 3x monthly loan payment
- Fast Turn times (less than 2 weeks)
- Online Application Process

Traditional Underwriting Loans.

- Loans for capital requests \$2,000,000 and over
- Includes a review of your financials over the last 3 years and a complete cash flow analysis
- The turnaround time is approximately 60 days.

Learn More About Westfield Bank's Cash Management Services

www.westfield-bank.com



Customized Insurance Agency Lending

AGILECAP® understands the insurance industry and they want to help your business and knows agents and agencies are unique. We get to know you — your goals, plans and timelines — so we can create a customized funding solution to meet your business needs. By collateralizing commissions and collecting just enough business information to understand your agency they can get you the funds you need to stay nimble and respond to opportunities to develop or grow your business.

How It Works

It is simple: Your Commissions = Collateral.

AGILECAP® realizes that your commissions are more than just income. They evaluate your portfolio of ongoing commissions and collateralize it to provide you with timely access to the capital you need. It is the key to their funding.



AGILECAP® Loan Advisors will evaluate your commission portfolio and offer you a simple, flexible loans with enough principal to achieve your goals using your commissions as collateral. Terms are transparent and turnaround is fast. You will know exactly what you need to repay and when, with no hidden fees or reserves. Loans:

- \$50,000 to \$2 million in principal
- Can fund in as little as five business days
- Competitive fair terms suited to your needs
- For health, life, property, marine, individual, small business, and commercial agencies

Your agency grows and changes, and so do your financial needs. AgileCap supports agency growth and development through all stages and phases. Our flexible funding options can help you with cash flow as you get established, fund infrastructure as your firm expands or changes, and facilitate a smooth transition during succession planning. We have the experience and knowledge to support agencies with funding for:

- Mergers & Acquisitions
- Marketing Plan
- Working Capital
- Recruitment & Training
- Bridge Loans
- Succession Planning

See how other agency owners have worked with AgileCap.

www.agilecapfunds.com



Cybersecurity
to protect and recover from an attack.



Everything You Need In A Secure Portal!

NeoCertified® Secure Email protects your sensitive information goes above and beyond the standards of a typical business model. The initial intent was to supply small to medium-sized businesses with an affordable, simple, seamless commercial-grade secure email solution.

Popular Solutions

With a plethora of advantages & perks sending and receiving encrypted emails has never been easier.



Secure Email Encryption - Send and receive secure emails directly from our Cloud-based portal from any internet-connected device, along with a plethora of other features.



Customer Connect - CustomerConnect is an inbound secure email solution that allows your clients to communicate securely with you directly from your website!



Email Add-in - NeoCertified's Secure Email Add-In for email applications allows you to both send and receive secure emails directly from your email application.

Seamless Integration at the Tip of Your Finger!



Google Chrome (Gmail) - Add the Secure Email Google Chrome Extension in seconds and you will be able to send & receive secure emails from Google Chrome & Gmail!



Outlook Email - Integrated Outlook add-in will let you send securely within your browser. The Outlook plugin is compatible with Outlook 2007 / 2010 / 2013 / 2016 / 2019 / & Office 365.



Office 365 - All it takes is the click of a button to send securely in Office 365. our encryption solution is perfect for personal or business use and will let you send securely within your personal browser!



Microsoft Edge – Install the Secure Email Microsoft Edge Extension in seconds and you will be able to send & receive secure emails from the Edge web browser!

How Does It Work?



Secure Encrypted Email - Add the Secure Email Extension and you will be able to send & receive secure emails from Google Chrome, Gmail, Outlook, Office 365, Microsoft Edge and more!



Log In To Your Account - Send & receive encrypted emails, track all your secure messages with 24/7 US-based support, a plethora of FAQ & support videos, & additional support for 100% of your recipients.



Compose & Send - You have the power to send secure email from anywhere in the world and NeoCertified Secure Email secure email solutions will fulfill all your compliance needs.



Access On All Devices - Phone, tablet, or computer... Regardless of the device, you can send an unlimited amount of secure email messages.

Interested in getting started with NeoCertified?



Works for anyone, anywhere, on any device

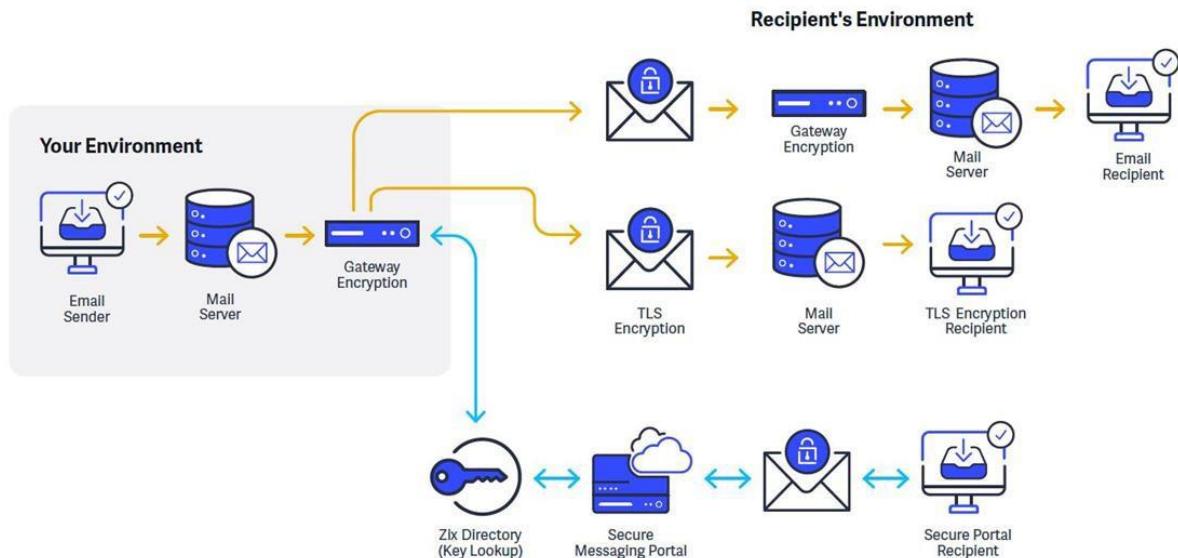
Zix® Email Encryption removes the hassle of encrypting email and gives teams the peace of mind of knowing that sensitive data sent via email is secure. It is all too easy for employees to send sensitive information to the wrong parties over the open internet. But if you secure it, you raise your passive threat defense and empower everyone to communicate freely and safely outside of your network.

Zix is simple and convenient, making it easy on users



- Automatic, bi-directional email encryption
- Simplified implementation
- Policy-based email protection and data loss prevention
- Automated key management
- Simple, policy-based TLS
- Convenient interface for senders and recipients
- Multiple secure delivery options (BMOD)
- Flexible delivery: pull or push
- Intelligent, policy-based management
- Robust compliance filters, scanning
- Dashboards and over 30 reports
- Proof of compliance
- Continuous updates

Best Method of Delivery(BMOD)



Productivity, Security, and Compliance powered by Secure Cloud



As an integral part of Secure Cloud, Zix Email Encryption works seamlessly with its other Security, Compliance, and Productivity services. Together, they form a fully integrated platform that allows partners and customers to create a secure, modern workplace.

Move to a Secure, Modern Workplace

www.zix.com



Your Journey Secured

Barracuda® Essentials provides simple email encryption because deploying standalone email encryption services can be so cumbersome to manage and use that many users decide to bypass their organizations' secure communication policies. Barracuda combines email encryption with other layers of data protection including data leak prevention, archiving, and filtering that blocks malware and advanced threats of a complete email protection solution that is extremely secure.

Benefits of Barracuda

91% of cyber-attacks start with an email, making email the number-one threat vector for cyber-attacks and securing your email requires more than just message encryption.



Secure Data-at-Rest and Data-in-Motion - Transport Layer Security (TLS) provides a secure channel for data transmission, and ensures that all content, emails, and attachments are encrypted during transit, known as data-in-motion security. TLS does not provide any security for data at rest. Emails and attachments may be unprotected while stored on sending and receiving servers. TLS by itself does not guarantee the security of your emails. Barracuda encrypts all email and attachments on every server where they reside.

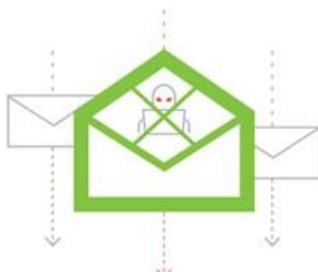
Military-Grade AES-256 Encryption with Automatic Key Management

Barracuda uses 256-bit keys to secure all encrypted emails. Keys and encrypted content are stored in data centers to ensure physical security. The data centers and the keys used to encrypt the data are stored in separate areas. Once an email is encrypted, a notification is sent to the recipient with a link to the Barracuda Message Center. The recipient will be required to create a password for first-time access and then use this password for all subsequent access.



Simplify Compliance with Granular Encryption Policies - Encryption must be used on emails that might contain sensitive or legally protected information. You can easily create policies to automatically encrypt emails based on the content, sender, recipient, keywords, domain, or many other criteria. This provides a safe and reliable way to share sensitive information with customers and partners. It reduces potential risk of data loss, while facilitating regulatory compliance.

Data Protection that Goes Beyond Encryption - Email encryption with [Data Leak Prevention \(DLP\)](#) automatically scans every outbound email for sensitive content. The email can be automatically encrypted, quarantined, or even blocked. Data is further protected by email archiving that ensures that [email retention policies](#) are enforced with a tamper-proof copy, a tamper-proof archive and cloud-based backup and recovery of all email communication.



Integrated Protection from Viruses, Malware, and Advanced Threats - Barracuda Essentials was built as a true, all-in-one email protection platform and includes filtering of every inbound and outbound email for spam, viruses, malware, and advanced threats like phishing. Combines data protection with multiple layers of email security to prevent email-borne cyber-attacks and stops malware and other targeted attacks that can result in data loss, theft, and reputation damage.

Go Beyond Traditional Email Encryption with Barracuda Essentials.



Outbound email is your biggest risk

Egress® is the only provider of human layer email security that prevents breaches, protects data using encryption, quantifies risk for ongoing compliance, and easily prevents inbound and outbound data breaches, caused by risky behavior and human error, without impacting productivity.

Intelligent Email Security - Provides the only solution to use contextual machine learning and powerful encryption technology to prevent breaches and protect data, as well as provide detailed reporting for admins.

- **Vigorous message-level encryption and rights management** - Encryption provides message-level protection via an on-premises, cloud, or hybrid solution, while comprehensive permissions include read-only access, disabled attachment downloads, and restricted forwarding.
- **Fine-grained message revocation, audit, and control** - Audit logs and message restrictions maintain control of shared information, while full revocation capabilities give you additional security by fixing mistakes and preventing a breach.
- **Government and industry certifications** – Egress has been accredited by industry bodies and governments with multiple certifications.
- **Customize email security policies and automation** - Prompt or enforce encryption when a user tries to send sensitive data or encrypt automatically based on the recipient and any keywords.
- **Secure File Sharing & Collaboration** - Enterprise-grade file sharing and collaboration solutions make it easy to securely receive and share data in large files, including multimedia, across teams or departments.

Secure File Sharing & Collaboration – Platform offers a safe and simple way to share content both internally and with external partners, reducing the risk of a data leak while safeguarding business productivity.

- **Secure Workspace** - Provides a secure environment for seamless file sharing and collaboration, with industry and government-certified encryption ensuring that sensitive data stays protected.
 - **Industry accreditations** - Sensitive content is in safe hands.
 - **Enhanced file protection** - Performs anti-virus and MIME checks on all incoming files, and then uses AES-256-bit encryption to protect them within their environment.
 - **Administrator and user controls** - Administrators apply granular controls to the file level and inspect file activity through detailed audit reporting and log information on all online collaboration.
- **Secure Web Form** - A simplified information sharing process by providing customizable forms that enable users to send data securely, and efficiently to different organizations.
 - **AES-256-bit encryption** - Secure Web Form automatically protects all data in transit and at rest using AES-256-bit encryption as it leaves senders and enters your organization.
 - **Third party verification** - Administrators empowered administrators to protect and control data by restricting file types and putting in place additional user verifications as required.
 - **Additional anti-virus checks** - Secure Web Form seamlessly integrates with best-in-class anti-virus solutions for network edge security and data privacy.

Try Egress for your security today for free

www.egress.com



Unlock the power of your data by maintaining control. Everywhere.

Virtru® email and file encryption products make it easy to share sensitive data and collaborate with business partners, customers, team members and is the **Google** recommended provider for email encryption and a member of the **Microsoft Accelerator™** program.

Virtru understands that data is your most valuable asset and sharing it is critical for success. But sharing creates significant risk. Virtru helps you protect data when sharing it, both internally and externally, fostering secure collaboration with persistent encryption, access controls, and revocation.

The Virtru Difference



Easy Enablement

- Start protecting data in minutes.
- Align with existing applications and workflows.
- Realize the full potential of existing security and collaboration tools.



Persistent Protection

- Secure data at the object level with the Trusted Data Format (TDF).
- Attach policies to the data to ensure persistent access control.
- Add Virtru protection to your custom applications.



External Sharing

- Support sharing in and out of mixed data environments.
- Audit and revoke access to data even after it's been shared.
- Manage Virtru policies and event monitoring with existing tools.

Extensible Data Protection Framework



Key Management - Customer-hosted keys for full control, or Virtru-hosted key management. HSM integrations for the highest levels of confidentiality.



Technology Integrations - End-to-end encryption, rights management, and secure external sharing extended to leading DLP, CASB, HSM, and other solutions. SDK allows you to integrate persistent protection into custom applications.



Industry-leading Usability - Support your users where they already work. Get up and running in minutes. Share securely across platforms and devices.



Trusted Data Format - The Trusted Data Format combined with patented UX technology allows granular data protection and access controls for any type of content.

A Better Way to Protect and Share Data

www.virtru.com



Detect and Block Both Known and Unknown Email Threats

Proofpoint® Email Protection provides multiple layers of security to stop malware and non-malware threats, such as email fraud. It can control all aspects of inbound and outbound email to detect and block threats and prevent confidential information from getting into the wrong hands. What's more, it supports cloud, on-premises, and hybrid installations.

Proofpoint Email Protection helps secure and control your inbound and outbound email. Messages and attachments are automatically protected with complete transparency. Traditional encrypted email services can be challenging for users. Users don't need to manually encrypt their email to send and receive messages securely—it just happens in the background. Email Encryption simplifies secure communications and leaves you in control.

Key Benefits

- ✓ **Simplified Policy Management** - All email encryption policies are centrally managed and enforced at the gateway. A convenient graphical interface helps you define encryption policies.
- ✓ **No-Touch Key Management** - Email Encryption eliminates the administrative overhead of key management. Administrators can even allow end users to revoke, expire, or restore access to encrypted email messages.
- ✓ **Integrated Information Protection** - Email Encryption makes the most of your existing investments in protection solutions. Custom policies can extend to both data in motion and at rest, all encrypted and protecting your emails.

Email Security and Protection

- **Advanced Email Filtering, Control and Visibility** - Allows you to set up robust email filtering policies as a first step in routing email to users. You can create detailed firewall rules based on your needs. Even set up policies for anti-virus. Leverage user bulk mail actions to improve the accuracy of future detection and classification. With a wealth of data and search tools, you can ensure your organization's email is protected.
- **Impostor Email Threat Protection** - Imposter attacks are hard to detect. Stateful Composite Scoring Service (SCSS) is a machine learning approach that searches specifically for these email threats. It uses what's known about your unique environment, along with data from all Proofpoint customers, to more effectively detect and block email fraud.
- **Internal Mail Defense** - As organizations move to cloud-based email services, compromised accounts are on the rise. Extend email security to help detect compromised accounts with Internal Mail Defense. It can automatically scan all internal email traffic, providing a multi-layered approach to identify spam, malware or phishing attacks sent via compromised accounts. It removes these emails and provides reporting to show which accounts have been compromised.
- **Email Continuity** - Email downtime can be a significant hit to worker productivity. Enterprise Continuity ensures email is always available, even if your company email is down. It provides full access to users—via Outlook integration, a web portal or native mobile support. And it automatically activates in an outage, with fully automated recovery.

Ready to evaluate your options?

www.proofpoint.com

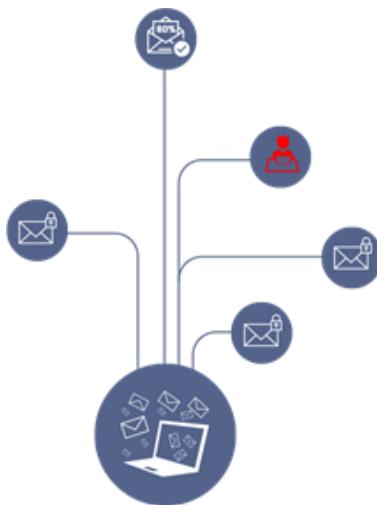


No portals. No plugins. No extra steps.

Paubox® seamlessly integrates with business email platforms like G Suite, Office 365, Microsoft Exchange and also plays nice with mobile devices, even smart watches. Perfect for organizations with staff that are not tied to a desk. Eliminate paper and faxes by adding email into all your workflows. Paubox eliminates the hurdles of extra steps for your recipients too, making email a secure and easy way to send messages and attachments. No wasted time or errors dealing with scanning, manual entry and chasing down faxes. Works with any device and email client

Transport Layer Security (TLS) makes email secure.

From the time a message leaves your inbox, makes its way across the internet, and gets to your recipient's inbox, it can be intercepted or read unless it's secured.



The National Institute of Standards and Technology (NIST) sets the standards for protecting email by advising use of Transport Layer Security (TLS).

When both the sender and recipient's email service use TLS, messages are secure while in transit.

Not all email providers are capable of receiving a message encrypted with TLS, which results in a message being delivered in cleartext that anyone can read.

It is estimated only 80% of email uses TLS, which means 2 out of 10 emails sent can be stolen or read by cyber criminals.

Utilizing an email encryption provider like Paubox can solve that problem and meet regulatory requirements (like HIPAA).

Improve Workflows and Lower Costs

It's time to get rid of the fax machine. Not only is Paubox easier to use but has a lower Total Cost of Ownership than a fax machine.



- Zero-step encryption
- Works with any device and email client
- Sends secure calendar invites

Trust and Compliance

HITRUST CSF Certified is the gold standard of security frameworks.

- U.S. Data Centers
- Blanket TLS Email Encryption
- Business Associate Agreement provided



Ready to get started?

www.paubox.com

Email Encryption
Feature Comparison and Pricing Schedule
Coming Soon!



Cybersecurity that crushes what others don't

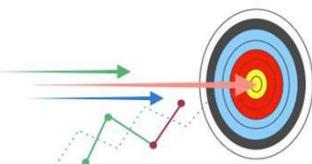
Malwarebytes® Endpoint detection and response keeps your business and endpoints safe from cybercriminals with a cloud-hosted security platform that maximizes limited resources and simplifies endpoint protection. Innovation that secures without sacrificing endpoint performance, taking you from infection to recovery in seconds.

Powerful security in a light agent



- Unlike old-school signature-based approaches that wait until attacks kick in, Malwarebytes Endpoint Protection finds and blocks threats before devices are infected. This happens by recognizing and preventing both hostile code and bad behavior by people.
- You'll now block threats others miss, including web-based attacks, zero-day malware, ransomware, PUPs, PUMs, and more.
- All via an agent deployed with a small footprint, ensuring you won't strain end-user productivity. Security teams stay productive too, as you harden apps and devices without code modification.

Whitelisted goodware means fast, accurate verdicts



- While others use conventional techniques that fall short, Malwarebytes employs innovative machine learning and artificial intelligence that applies a patented goodware model.
- In a nutshell they whitelist properly signed code from known vendors, as well as other code that passes rigorous inspection (the goodware library already includes over a billion lines of approved code). This code is omitted from future scans to save time, eliminate false positives, and provide increasingly accurate verdicts.
- They also test for malicious code and bad behavior at all stages, from installation to execution and shutdown.

Simplify management via single dashboard driven from the cloud



- Avoid the complexity of multiple consoles managing a patchwork of one-off tools. Malwarebytes gives you a single dashboard with an easy-to-use interface, delivering real-time status of events and device health across your network.
- The user interface also controls all functionality across a full suite of endpoint protection software. This includes the ability to easily prioritize remediation via multiple filters, like severity of threat, physical location, and other criteria.
- Ideal for organizations large or small, Malwarebytes Endpoint Protection makes blocking threats a matter of clicks not scripts.

Join the community that have built their endpoint resilience.

www.malwarebytes.com



Securing your journey to the cloud

Trend Micro™ Email Encryption Solutions keep your email confidential, simplify compliance, and reduce management costs by removing the complexity from encryption. Email is a vital business tool for sending and receiving even the most confidential messages. Yet any time you send sensitive information over the Internet, you expose yourself to the risk of a data breach. Organizations want extra security - but without the burden of extra overhead.

Solutions enable recipients to read encrypted emails on any device using a web browser.



Advantages

- **Effortless Key Creation** - Unlike other solutions, Trend Micro email encryption features dynamic key generation, built with Trend Micro™ Private Post™ technology, eliminating the pre-enrollment and certificate management hassles of PKI encryption. All you need is a recipient's email address to create encryption keys.
- **No-Maintenance Key Management** - Hosted key management helps ensure the availability of encryption keys 24x7, providing password and key recovery without the need for IT involvement.
- **Easier for Email Recipients** - Web-based Zero Download Reader enables your intended recipients to decrypt emails without requiring them to install client software, and supports mobile devices running iOS and Android. Solutions help you comply with the regulations and requirements of partners and customers by allowing you to secure both incoming and outgoing emails and attachments.
- **Lower IT Costs** - Our email encryption solutions minimize IT administration and lower overall costs thanks to all of the above: effortless key creation, hosted key management, plus ease of use for both senders and recipients.
- **Flexible Encryption Options Policy-driven encryption**
 - Email gateway policies scan email content and metadata and automatically encrypt based on content, senders, or recipients User-driven encryption
 - Email gateway policy combined with user training encrypts based email subject starting with "Encrypt" or "Confidential"

The easiest email encryption for achieving compliance

Prepare for, withstand, and rapidly recover from threats.

Trendmicro™ continuously innovates to stay one step ahead of the bad guys as IT infrastructure continues to change, user behavior becomes riskier, and threats evolve. Founders set the tone, the culture, and the road to innovation – building a strong team of passionate people who work together to make the world safe for exchanging digital information, today and in the future.



Hybrid Cloud Security - Cloud security simplified with Trend Micro Cloud One™ security services platform. Simple. Automated. Improved visibility and control.

- Runtime protection for workloads (virtual, physical, cloud, and containers)
- Image scanning in your build pipeline
- Security for cloud file and object storage services
- Security for serverless functions, APIs, and applications
- Cloud network layer IPS security
- Cloud security and compliance posture management



Network Defense - Detect and protect against known, unknown and undisclosed vulnerabilities with cross-generational protection techniques.

- Known vulnerabilities are known to the public and to security tools.
- Unknown threats have never before been seen and are usually created to specifically target an individual or enterprise.
- Undisclosed vulnerabilities are a hybrid between known and unknown. These vulnerabilities are usually known by some security researchers and the impacted software vendors.



User Protection - Protect users with the right technique at the right time – on any device, any application, anywhere, with simplified security that gives you increased visibility and a faster response to attacks.

- XGen™ security goes beyond next-gen security to synthesize high-fidelity machine learning with a blend of threat techniques for maximum protection.
- A full range of integrated protection across gateways, endpoints, mobile devices, servers, and SaaS apps. You get multiple layers of anti-threat capabilities to protect against even the newest and most sophisticated threats.
- Provide advanced detection and response capabilities. Further investigation capabilities are available through an optional add-on, Trend Micro Endpoint Sensor.
- Integrated data loss prevention protects your information while endpoint and email encryption ensure only authorized eyes see your information. Application and port control prevent users from sending information where it doesn't belong.
- You can manage all layers of security from a single management console, for comprehensive analysis of data and threats throughout your environment.
- Take your protection to the next level with threat insights from Trend Micro's threat defense experts and real-time updates from our global threat intelligence network.

Optimize security, increase value, and reduce costs

www.trendmicro.com



Security Where You Need It

Symantec Gateway® Email Encryption provides centrally managed email encryption to secure email communications with customers and partners regardless of whether or not recipients have their own email encryption software. With Gateway Email Encryption, organizations can minimize the risk of a data breach while complying with regulatory mandates for information security and privacy.

Users are everywhere and need quick access to data and cloud applications around the clock. In the cloud, on-premises, or both, you need to stop inbound and outbound threats targeting your end users, information, and key infrastructure. Today's web & email protection must account for this new reality while balancing security, performance, complexity, and cost.

New Challenges



Blind Spots from encrypted traffic create vulnerabilities



Spear Phishing attacks are on the rise



Modern Threats overwhelm old network defenses



Backhaul Traffic is a costly drag on performance

Protect your information in email, whether in transit or at rest.



Secure Web Gateway - Symantec Secure Web Gateway solutions draw on a unique proxy server architecture to effectively monitor, control, and secure traffic for a safe web and cloud experience.



Messaging Gateway - Defend your email perimeter against spam, malware, and targeted attacks with content filtering, data loss prevention, and encryption.



Encrypted Traffic Management - Symantec Proxy and SSL Visibility Appliance decrypt traffic, feed existing security infrastructure, and maintain privacy compliance.



Advanced Threat Protection - Symantec Advanced Threat Protection solutions detect unknown malware through deep content inspection, plus investigate and remediate advanced threats targeting your enterprise.

Today the network perimeter is wherever the data is.

Stop threats hiding in plain sight.

Symantec™ Endpoint Security Complete delivers the most comprehensive and integrated endpoint security platform on the planet. As an on premises, hybrid, or cloud-based solution, the single-agent Symantec platform protects all traditional and mobile endpoints, providing interlocking defenses at the device, application, and network level, and uses artificial intelligence (AI) to optimize security decisions. A unified cloudbased management system simplifies protecting, detecting, and responding to all the advanced threats targeting your endpoints.

New Challenges



Fileless, ransomware and other emerging threats are penetrating old defenses



Stealthy attacks and living off the land are harder to spot than malware



Billions of Internet of Things devices create countless new attack surfaces



A plethora of endpoint operating systems creates additional security complexity

Protections for All Phases of the Attack Lifecycle

Pre-Attack

Attack Surface Reduction - Delivers proactive endpoint defense with pre-attack surface reduction capabilities based on advanced policy controls and technologies that continuously scan for vulnerabilities and misconfigurations across applications, Active Directory, and devices. With attack surface reduction defenses in-place, many attacker tactics and techniques cannot be leveraged on your endpoint estate.

Attack

Attack Prevention - Multilayer attack prevention immediately and effectively protects against file-based and fileless attack vectors and methods. Machine learning and artificial intelligence uses advanced device and cloud-based detection schemes to identify evolving threats across device types, operating systems, and applications. Attacks are blocked in real-time, so endpoints maintain integrity and negative impacts are avoided.

Breach

Breach Prevention - Prevention approach entails containing attackers as early as possible—at the endpoint—before they have any opportunity to persist on the network. Various AI-driven deception and intrusion prevention technologies work together to thwart network persistence before and immediately following endpoint compromise—before a full-blown breach can occur.

Post Breach

Post Breach Response and Remediation - Endpoint detection and response (EDR) technologies and unmatched security operations center (SOC), gives you the tools necessary to quickly close out endpoint incidents and minimize attack impacts. A single-agent architecture covers both traditional and modern endpoints, precisely detects advanced attacks, provides real-time analytics, and enables you to actively hunt threats and pursue forensic investigations and remediation.

**Endpoint, Network, Email, Cloud.
However they attack, you are covered.**



Detect and Block Both Known and Unknown Email Threats

Proofpoint® Email Protection provides multiple layers of security to stop malware and non-malware threats, such as email fraud. It can control all aspects of inbound and outbound email to detect and block threats and prevent confidential information from getting into the wrong hands. What's more, it supports cloud, on-premises, and hybrid installations.

Proofpoint Email Protection helps secure and control your inbound and outbound email. Messages and attachments are automatically protected with complete transparency. Traditional encrypted email services can be challenging for users. Users don't need to manually encrypt their email to send and receive messages securely—it just happens in the background. Email Encryption simplifies secure communications and leaves you in control.

Key Benefits

- ✓ **Simplified Policy Management** - All email encryption policies are centrally managed and enforced at the gateway. A convenient graphical interface helps you define encryption policies.
- ✓ **No-Touch Key Management** - Email Encryption eliminates the administrative overhead of key management. Administrators can even allow end users to revoke, expire, or restore access to encrypted email messages.
- ✓ **Integrated Information Protection** - Email Encryption makes the most of your existing investments in protection solutions. Custom policies can extend to both data in motion and at rest, all encrypted and protecting your emails.

Email Security and Protection

- **Advanced Email Filtering, Control and Visibility** - Allows you to set up robust email filtering policies as a first step in routing email to users. You can create detailed firewall rules based on your needs. Even set up policies for anti-virus. Leverage user bulk mail actions to improve the accuracy of future detection and classification. With a wealth of data and search tools, you can ensure your organization's email is protected.
- **Impostor Email Threat Protection** - Imposter attacks are hard to detect. Stateful Composite Scoring Service (SCSS) is a machine learning approach that searches specifically for these email threats. It uses what's known about your unique environment, along with data from all Proofpoint customers, to more effectively detect and block email fraud.
- **Internal Mail Defense** - As organizations move to cloud-based email services, compromised accounts are on the rise. Extend email security to help detect compromised accounts with Internal Mail Defense. It can automatically scan all internal email traffic, providing a multi-layered approach to identify spam, malware or phishing attacks sent via compromised accounts. It removes these emails and provides reporting to show which accounts have been compromised.
- **Email Continuity** - Email downtime can be a significant hit to worker productivity. Enterprise Continuity ensures email is always available, even if your company email is down. It provides full access to users—via Outlook integration, a web portal or native mobile support. And it automatically activates in an outage, with fully automated recovery.

Driving Behavior Change

Proofpoint® provides the most effective cybersecurity and compliance solutions to protect people on every channel including email, the web, the cloud, social media, and mobile messaging. Most cyber-attacks target people, not technology. That's why their approach to cybersecurity centers around people. **Proofpoint®** helps you understand the individual risk people pose, stop the threats that target them and provide the tools they need to stay safe and alert. No other cybersecurity company protects people and brands more effectively than **Proofpoint®**.

Protection and visibility for your greatest cybersecurity risk—your people.



Threat Protection - Defend your #1 threat vector, stopping malware, credential phishing, and impersonation across email, cloud, and mobile messaging. Orchestrate responses to detected attacks and get actionable intelligence on who your Very Attacked People (VAPs) are.



Information Protection - Get visibility into where your sensitive data is exposed across email and the cloud. Lock down access to files in the cloud, prevent data loss, and archive email and other communications to stay compliant.



User Protection - Educate your people and reduce risk with advanced threat simulations and cybersecurity awareness training. Protect them across personal webmail and web browsing.



Ecosystem Protection - Secure the digital channels you don't own. Block imposter attacks and malicious content that uses trusted and lookalike email domains, web domains, and social media handles.

What Sets Proofpoint Apart

Email, social media, and mobile devices are the tools of your trade—and for cyber criminals, the tools of attack. Proofpoint protects your **people, data and brand** against advanced threats and compliance risks.



A Proven Suite of Solutions - Solutions stop 99% of attachment-based attacks. And every day, they detect and block advanced threats and compliance risks in more than 5 billion emails and 10 million cloud accounts.



Cloud-Enabled Speed and Innovation - Solutions are built on an advanced cloud platform that blends speed and innovation. They deploy, adapt, and update faster than on-premises tools to keep you ahead of the latest threats. For example, a 360,000-user organization recently deployed their solutions in just 48 hours.



Far-Reaching Intelligence and Visibility - No other cybersecurity vendor has a global intelligence platform that spans email, social and mobile. They analyze more than 100 billion data points a day. This gives you the critical visibility you need to understand an attack—and the insight to resolve it quickly and effectively.

Ready to give Proofpoint a try?

www.proofpoint.com



Think Forward, Together.

AppRiver® is an email and web security company that protects businesses of all sizes from spam, viruses, and other online threats. AppRiver was founded with a mission to develop and deploy a steady flow of powerful email and Web security solutions and make them available to companies around the world.

Zix® removes the hassle of encrypting email and gives teams the peace of mind of knowing that sensitive data sent via email is secure. It is all too easy for employees to send sensitive information to the wrong parties over the open internet. But if you secure it, you empower everyone to communicate freely and safely.

Zix is simple and convenient, making it easy on users



- Automatic, bi-directional email encryption
- Simplified implementation
- Policy-based email protection and data loss prevention
- Automated key management
- Simple, policy-based TLS with secure fail-over
- Convenient interface for senders and recipients
- Multiple secure delivery options (BMOD)
- Flexible delivery: pull or push
- Intelligent, policy-based management
- Robust compliance filters, scanning
- Dashboards and over 30 reports
- Proof of compliance
- Continuous updates

Email encryption and data loss prevention offer unparalleled peace of mind



Email Encryption - Automatic email encryption and data loss prevention offer unparalleled peace of mind for you, your employees, and your executives.



Email Threat Protection - Prevent malware, ransomware, and other advanced threats from compromising your email and your business.



Information Archiving - Provides secure message retention, making compliance and eDiscovery easier for you and your team.



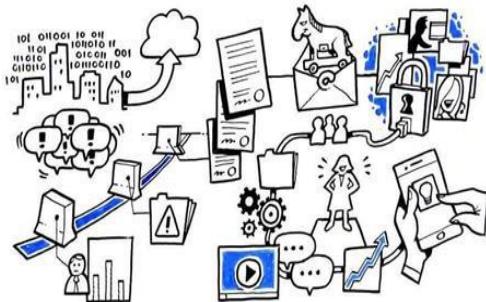
Email Message Privacy - Transform your existing email environment into a secure communications workplace, with point-to-point message encryption and tracking, large file sharing, and e-signature capability.



Secure File Share - Securely share files of any size and type, with tracking features and e-signature capability, all designed to keep your business moving forward.

Digital Transformation creates many challenges for today's business.

AppRiver® brings you technology and phenomenal care that keeps you moving forward.



- ✓ Achieve a Secure, Modern Workplace
- ✓ Migrate to the Cloud with Phenomenal Care
- ✓ Prepare for Expanding Regulations
- ✓ Modernize Your Archive
- ✓ Defend Against Threats, Breaches, and Attacks

Move to a Secure, Modern Workplace powered by Secure Cloud

Enhance your productivity, increase your security, and strengthen your compliance with the power of Secure Cloud.



Digital Transformation - Establish a modern workplace for better data sharing, collaboration, flexibility, and remote work.



Cloud Migration - Organizations undergoing a digital transformation & cloud migration face daunting obstacle from security and compliance issues, to keeping an increasingly dispersed workforce productive.



Secure, Modern Workplace – Secure Cloud, backed by Phenomenal Care, was purpose-built to help you build a Secure, Modern Workplace and solve these challenges.



Secure Cloud - Unleash your team to become more productive, secure, and compliant in a complex, digital world.



The key to productivity is a Secure, Modern Workplace

www.appriver.com



Everyone has the right to be secure in a connected world.

Webroot® is passionate about protecting businesses and consumers from cyber threats. They combat today's most complex cybersecurity challenges and are constantly anticipating how to extend the value of their threat identification, prediction, and remediation to the connected world.

Why Webroot?



Purpose-built for Business - Webroot Business Endpoint Protection, DNS Protection, and Security Awareness Training were specifically designed to serve the unique challenges faced by MSPs and small- to medium-sized businesses. Integrated into the same unified admin console, our cybersecurity solutions offer the automation and ease of management you need to successfully grow your business.

Business Endpoint Protection

- Stop threats with next-gen threat intelligence
- Protect your business from ransomware
- Get full visibility and reporting
- Set it and forget it

DNS Protection

- Stop up to 88% of malware at the DNS layer
- Get detailed reports on-demand
- Enable policies by group, device, IP
- Apply leading web classification

Security Awareness Training

- Reduce click-through on phishing by up to 70%
- Support compliance (SEC, FINRA, PCI, HIPAA, GDPR, etc.)
- Schedule training and auto-run reports

New Webroot® Evasion Shield



- Protects against file-based and fileless script attacks
- Blocks malicious JavaScript, VBScript, PowerShell, macros, and more
- Enables admins to detect scripts running in their environments
- Allows whitelisting for legitimate scripts

Put time back in your day so you can focus on other business-critical tasks.

- Easy-to-use, lightning-fast protection
- Cloud-based, hassle-free management
- RMM, PSA & BI integrations
- Lower costs & flexible billing
- No software conflicts or reimaging

Learn how customers win with Webroot.

www.webroot.com

Endpoint Security
Feature Comparison and Pricing Schedule
Coming Soon!



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