

WealthServ

Compensation Management Fact Sheet



WealthServ Compensation Management is specifically designed to provide a comprehensive approach to your commissions, payouts, incentives/contests and more.

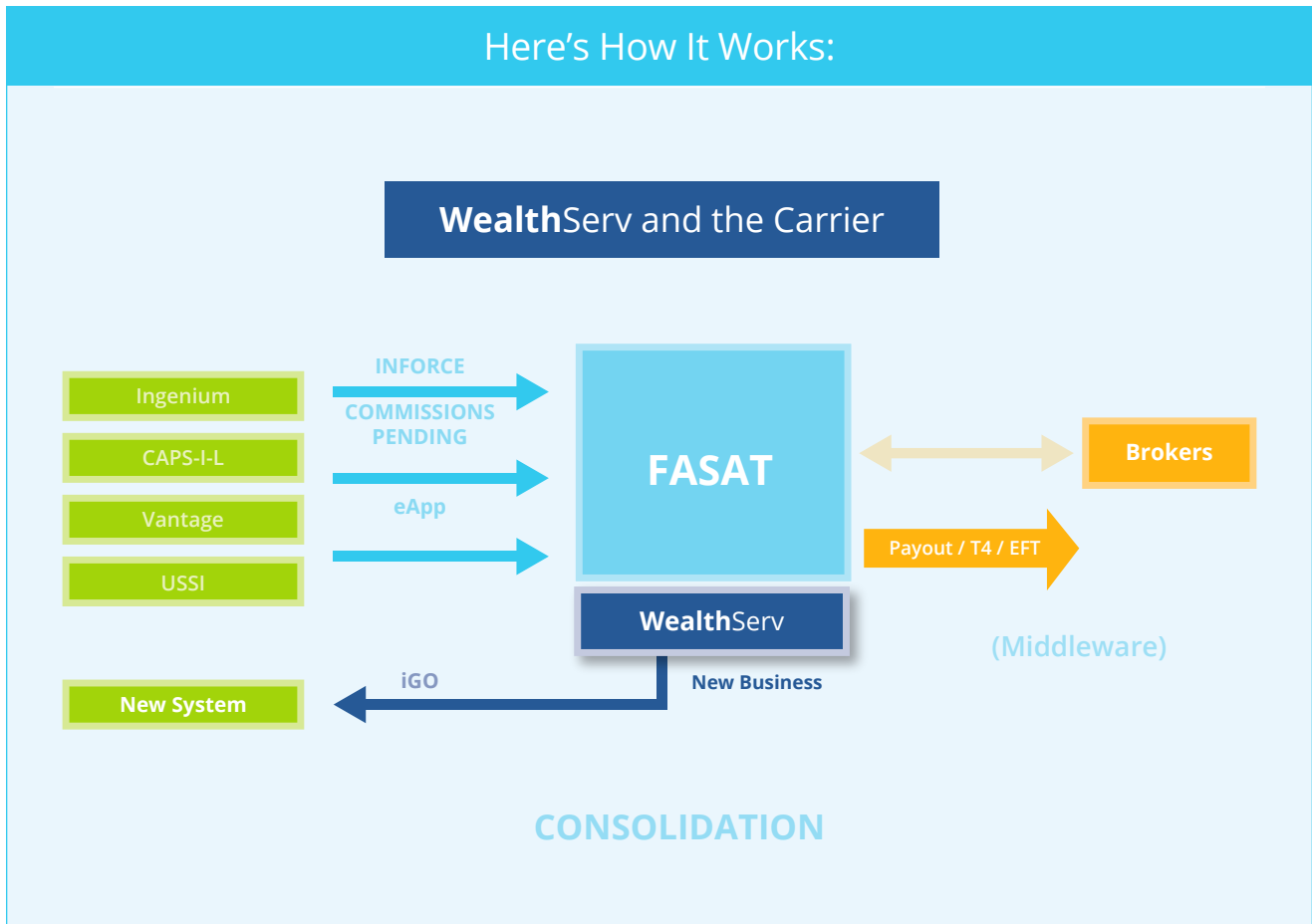
From multi-level distribution hierarchies to debt management constructs and incentive management, WealthServ currently supports all life insurance products supplied by insurance companies in Canada and the agreements they have with their distribution partners.

WealthServ is a back office platform that supports organizations that run multiple divisional or legal entities, allowing the setup of each of these with their own hierarchies and payout structures. This allows the software to support the proliferation of the distribution relationships that they need and maintain the integrity of the hierarchy of ledgers associated with each entity – **right down to the broker.**

It's a broad platform that supports the management of:

Incentive Management – including bonuses & contests	Commissions Payments – FYC, FYO, Service Fees, Trailers and Debt
Payouts & T4	Debt Management
Licensing & Contracting	Multi-Level Distribution Hierarchy
Compatible with Industry Standards – CITS, APEXA	Extensive & Flexible reporting
Supports all carrier plans and plan types	Segregation of duties / Permission Controls

Here's How It Works:



WealthServ has a long standing track record of success working with Carriers, National Accounts and MGAs, processing more than 60% of the life insurance business in Canada and handling millions of commission payments since 2001. With minimal integration, WealthServ Compensation Management is ready to tackle the distribution management and compensation management that Carriers need.

To learn more about the WealthServ Compensation Management system or to schedule a demo:
[email info@bluesun.ca](mailto:info@bluesun.ca) or call 1 (877) 565-1828

Security First

In an ever changing landscape of security risks and compliance demands, we take the utmost care to ensure our client's data is kept secure with a cloud based solution utilizing data centers with bank level security.

Bluesun is a leading provider of software solutions to the financial services industry and Canadian life insurance business in the independent channel.

Learn more at Bluesun.ca

