

Vue[®] Distribution Accelerator Platform

Multi-Channel Distribution Modernization
for the Global Insurance Industry

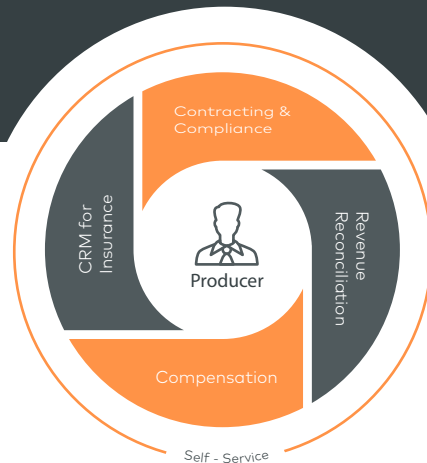
For MGAs, FMOs, IMOs, and Insurance Distributors



Modernize and Thrive

The Most Flexible End-to-End Platform

To support your distribution strategy for growth



This new technology is leading the way to modernize distribution, innovation, and growth for Life & Annuity, P&C, and Health insurance distributors. Vue Distributor Accelerator Platform is the most flexible, scalable, and configurable solution available that seamlessly integrates electronic contracting, recruiting, compensation management, compliance, producer self-service portals, and integrated analytical tools into a single platform.

Vue Contracting & Compliance, Vue Compensation, Vue Revenue Reconciliation and Vue CRM for Insurance Distributor modules are tightly integrated in the Vue Distributor Accelerator Platform.



Life & Annuities



Property & Casualty



Health Insurance

Vue Contracting & Compliance

Vue Contracting & Compliance is designed for large distributors (MGA, FMO, IMO, and Brokers) working with multiple insurers who wish to modernize their administration and grow their business. Vue's once-and-done workflow automates the entire producer-management process including producer licensing, contracting, and compliance. It automates the contracting of new producers with digital processing that ensures regulatory compliance, complete self-service automation of additional appointment requests, license terminations, and ongoing product training certification.

Features

- Producer contracting
- Producer compliance appointment requests and tracking eligibility
- Producer licensing
- Requires producer self-service portal
 - Self-service producer management
 - Self-service compliance

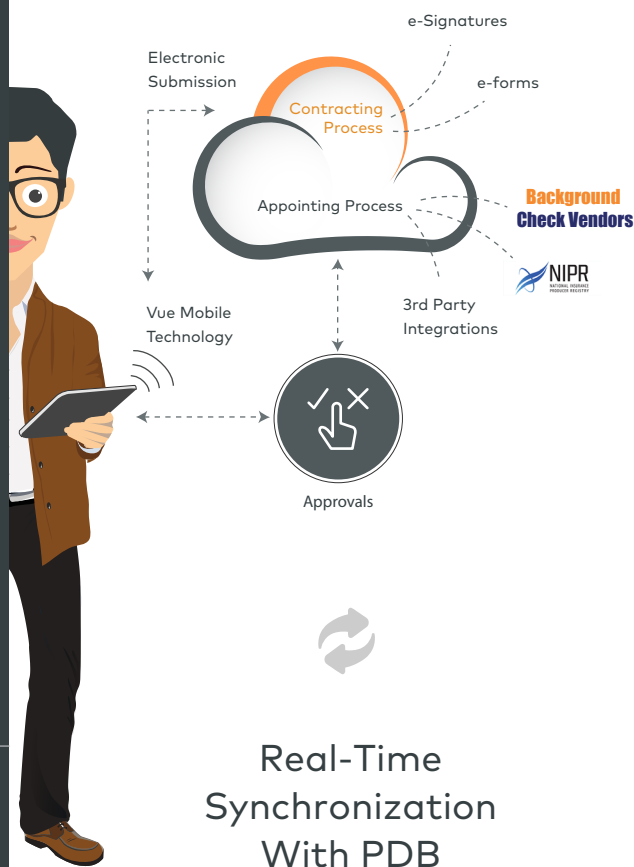


of Companies consider making a streamlined distribution process a "high priority"



of Companies consider "reducing operating expenses" a major challenge

Simplify end-to-end producer contracting with Vue's industry leading workflow based application



Vue Compensation

A powerful and flexible solution that makes it easy for large distributors (MGA, FMO, IMO, and Brokers) to administer revenue and provide rich commission and incentive programs. Includes a robust, automated revenue-reconciliation tool to manage revenue receivables and identify discrepancies in commission payments made by carriers, allowing you to recover rightful income.

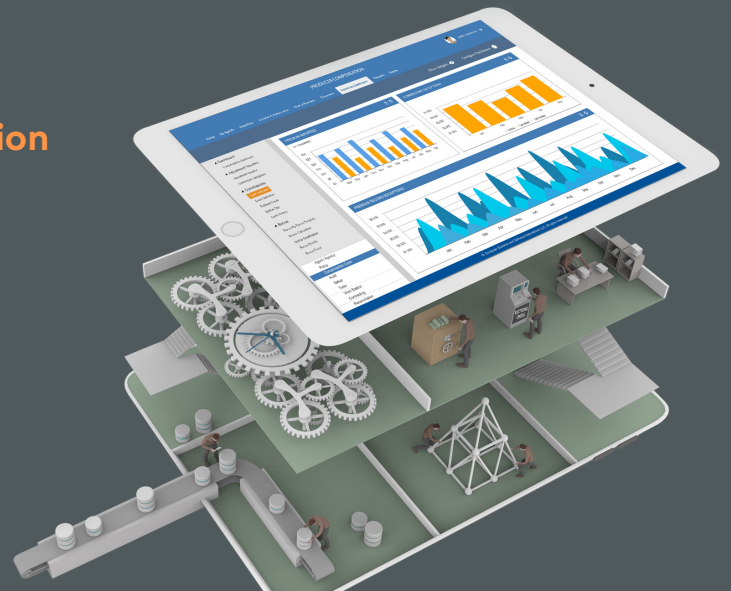
Vue Compensation integrates directly with Vue Contracting & Compliance and Vue CRM for Insurance Distributors.

Features

- Supports all insurance compensation plans
- Powerful event-driven compensation-calculation engine
- Custom compensation workflows
- Distributor book of business
- Insurance product-line support

The secrets of a **successful Distribution Compensation** system revealed

- Validation
- Accounts
- Payments
- Journals
- Measures / Expression
- Hierarchy / Credits
- User-Defined Rules
- Revenue Reconciliation



\$10B+ Premium transactions administered annually

Vue Revenue Reconciliation

Vue Revenue Reconciliation helps large distributors (MGA, FMO, IMO, and Brokers) as well as private exchanges, easily identify and resolve commission and revenue errors with your carrier partners.

Features

- Book of business
- Account receivables
- Revenue recognition
- Deposit reconciliation
- Revenue reconciliation
- Reporting
- Projections
- Control timing

- Track complex commissions and recover revenue
- Automated revenue recognition
- Manage commission receivables and revenue projections

Eliminate confusion with user-friendly reports that provide discrepancy details and can be communicated to the carrier to better manage commission differences and disputes.



Easy resolution of discrepancies with carriers

Vue CRM for Insurance Distributors

A robust web-based out-of-the-box CRM application built for insurance distributors (MGA, FMO, IMO, and Brokers) who have outgrown their current tools. Drive growth and manage the complexity of a multi-carrier, multi-channel distribution system. We offer unmatched flexibility and configurability to maintain the uniqueness of each distributor's business model that fosters producer management, recruiting, sales-opportunity management, 24x7 accessibility, and Vue analytics.

Features

Career agent: Sales based

- Insured contact management
- Lead management
- New business
- Sales reporting
 - Recruiter/Marketer: Agent based
- Lead management
- New carrier contract
- Agent contract administration
 - Vue analytics



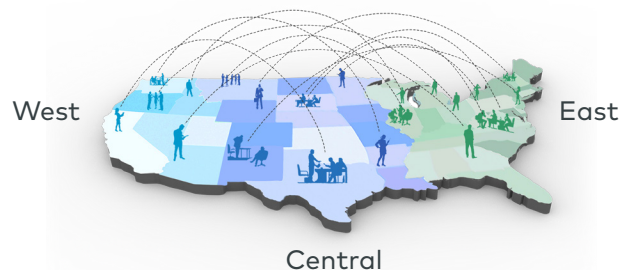
Vue provides a solid solution for the insurance industry



Jim Dickie, CRM Magazine

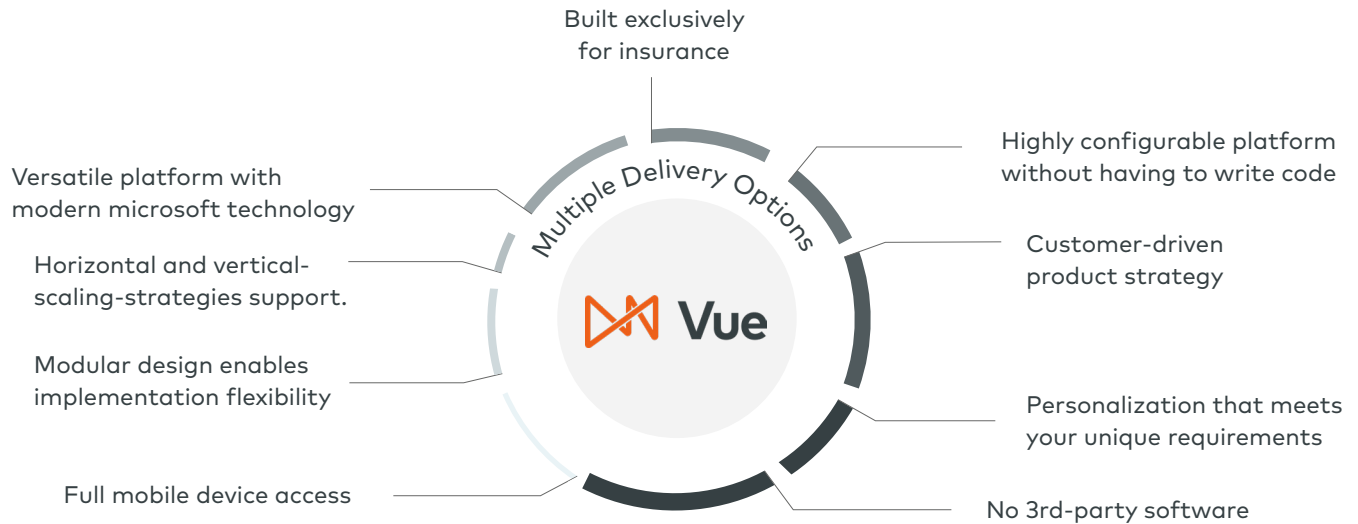
Modernizing Insurance

Marketing & Sales Operations



Drive growth and manage the complexity of a multi-carrier, multi-channel distribution system

There's a reason we are #1 in distribution technology



10%
Project go live

1M+
Producers managed

100+
Valued clients

10B+
Premium transactions administered annually



After the many years of introducing, integrating and building a tool, it was totally refreshing to work with knowledgeable and critical thinking people. The staff that helped 'build out' for Golden Outlook, needs a big Thank you from us. I hope your top management recognizes these people as 'Top Shelf Staff.' I hope to continue working with them.

Alan Sundeen, Senior Business Analyst



Investing in technology is a key component to our broker support model. The addition of Vue will help support Emerson Reid's company growth and provide our broker partners with the latest reporting tools to manage their book of business.

George Rosiak, President



We selected Vue's Producer Compensation Management because it has a proven record of handling the complexities inherent in our business. The Vue team's industry expertise and history of successful deliveries assured us that we are choosing the right strategic partner for this project.

Ryan Patterson, Vice President



The only way we could make this business model work in our market was to automate as much of the process as we can and develop the reporting needed to both attract insurance producers and analyze our business going forward. The systems we have implemented from Vue provides the broad operational integration we needed to compete and scale up.

Jim Streitenberger Manager, Channel Sales Compensation



With our business expansion, we needed a system that could manage our commissions processing and help track a rapidly-expanding distribution channel. Vue provided us with a solution that would fit well into our existing model and scale to meet growth expectations. The Vue team's understanding of our business and experience in implementing solutions for other managing general agencies are major factors that prompted our decision.

Don Fronczak, Chief Operating Officer



Some of our Clients



Modernize and Thrive

Backed by over 27 years of insurance industry experience, Vue provides flexible, configurable solutions that improve efficiency, reduce costs, and increase revenue. 400+ team members focus solely on distribution technology. Vue is the only vendor to offer a highly configurable platform – without having to write code – that can quickly modify infrastructure to execute distribution and sales strategies. Insurance Carriers, MGAs, IMOs, and Distributors are able to implement modules incrementally, as required.



Carriers and their distribution partners are increasingly faced with rapidly shifting and complex distribution channels that have escalating expectations for service levels

CELENT

Vue's flexible and modern distribution technology is the strategic differentiator in distribution management.

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Ahmedabad

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Next to shell petrol pump, 100 Ft road,
Prahladnagar, Ahmedabad-15



Modernize and Thrive

About Vertafore

For over 50 years, Vertafore, the leader in modern insurance technology, has built and supported superior InsurTech solutions to connect every point of the distribution channel. Vertafore's agency management, ratings, regulation, compliance, and connectivity products streamline workflows, improve efficiency and drive productivity for more North American insurance professionals than any other provider—including more than 20,000 agencies, over 1,000 carriers and 23 state governments. Through a continual focus on operational excellence, development of innovative solutions, and alignment with key industry partners, Vertafore is leading the way for customers of all sizes by delivering results that make a difference. For more information about Vertafore, visit www.vertafore.com.

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