

# PROFORMEX CASE STUDY: Lion Street

Proformex helps Lion Street owners deliver unprecedented inforce life insurance management to their policy owners.

## PROFORMEX

InForce Policy Management



### THE CHALLENGE

*"I am very bullish about the Lion Street/Proformex partnership, because just as Lion Street is on the cutting edge of the life insurance distribution world, Proformex is on the cutting edge of the fiduciary management of life insurance policies."*

*- Tyler Horning, TDC Life*

Lion Street recognized the life insurance industry's need for consolidated inforce policy management and wanted to provide a solution for their owners. They knew developing their own platform would require a substantial financial commitment in information technology, software and post-sale expertise, so they searched the market for a customizable solution instead.



### THE SOLUTION

Ultimately, Lion Street discovered and partnered with Proformex to provide a software platform that simplifies the complexities typically associated with ongoing policy management by combining powerful technology with an easy-to-use interface. The technology put portfolio oversight and control at their owners' fingertips to automate policy reviews, save time, reduce cost, and deliver a more consistent policy monitoring and reporting experience.



Founded in 2010 by industry veteran Bob Carter, Lion Street was built to serve the sophisticated financial needs of wealthy individuals and corporate clients. Lion Street Firms provide life insurance, business insurance and wealth management solutions to high-net-worth individuals, business owners and corporate clientele.

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