

PROFORMEX

InForce Policy Management

We help agents, advisors, trustees, and fiduciaries proactively monitor their clients' life insurance policies

Monitoring inforce life insurance performance relative to the original performance expectations can be a difficult task for agents, advisors, trustees and fiduciaries trying to protect their clients' interests. Proformex was created to make InForce Policy Management easy. Our intuitive platform helps you monitor, analyze and manage the performance of your clients' life insurance policies in a single, distribution-agnostic platform.

POLICY MONITORING

Identifies and Tracks 5-Key Contact Components



Coverage Length



Insurance Amount



Contract Cost



Policy Performance



Carrier Strength

PORTFOLIO CONSOLIDATION

Consolidates Policy Information and Generates Portfolio Based Alerts



Lapse Alert



Term Alert



Conversion Alert



Settlement Alert



Finance Alert

PORTFOLIO MANAGEMENT

Provides Technology and Flexibility to Efficiently Govern Policies



Customizable Configuration



Searchable Data



Holistic Viewing



Fiduciary Functionality

CALL TODAY **866-998-8654** OR VISIT US AT **WWW.PROFORMEX.COM**