A Powerful Back-Office Agency Management System That Connects You To All Your Stakeholders

Streamlining Insurance Distribution & Commission Management

Equisoft/centralize

Specifically designed for Agencies (BGAs & MGAs), Banks and National Accounts to give you control of critical processes, streamline the management of insurance applications and boost profitability.

" This software has helped us automate 85% of our business processes straight through, without any kind of intervention. It's indispensable. "

– Leading Canadian Financial Institution

Connect your Operations to Automation & Data

Equisoft/centralize is the most powerful and compliant way to connect feeds from carriers and paramedical companies to client policies – all in a single platform.

Automated data feeds from major carriers

▶ Full integration of all available insurance carrier and paramedical company data feeds.

Designed to Optimize Daily Tasks & Activities

Adopt best practice processes with little effort

▶ Power your business with out of the box business processes built by industry insiders.

50+ off the shelf reports for the entire organization

▶ Policies Sold and Commission Projections are just a few of the key reports that track operations.

The Agent Portal provides a 360° view of the client

▶ Enables agents to easily see client data, application status and commissions.

Track leads & advisor productivity

▶ Makes it easy to track leads, and highlight advisor sales productivity.

Out of the Box Benefits of Managing your Business with Equisoft/centralize

▶ Easily manage complex commission structures

▶ Fully integrates ACORD & CITS feeds

▶ Best of breed business processes built in

▶ Modern & open platform that lets you own your data

▶ Exceptionally intuitive user experience

We Support Our Clients Unlike Anyone in the Industry

Live customer support and direct access to our team of experts.

Licensing, Contracting & Appointments, It's All Taken Care Of

With Equisoft/centralize, every aspect of an advisor`s regulatory compliance is seamlessly scripted and built into your workflow and internal process.

▶ Reps licensing is aligned to jurisdiction. Mandatory documentation ensures both accuracy and completion rate are at 100%.

Implementing Equisoft/centralize Is Fast, Easy & Affordable

Enjoy the benefits of our robust back office system:

▶ System securely hosted by Equisoft
▶ Flexible pricing based on requirements
▶ Full user Access Rights Control (ACL)
▶ Also supports Role-Based Access (RBAC)

Accurate Commission Accounting Provides 100% Peace of Mind

The headache of enforcing commission accuracy is a thing of the past.

Ensure accuracy of carrier fees & commissions

▶ Easily handle complex hierarchy structures to process payouts. Clearly identify discrepancies between expected & received compensation.

Commissions & compensation management

▶ Support all commission structures, and custom compensation types.

Connect with us today and find out how we can help:

USA & Canada

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Book a meeting

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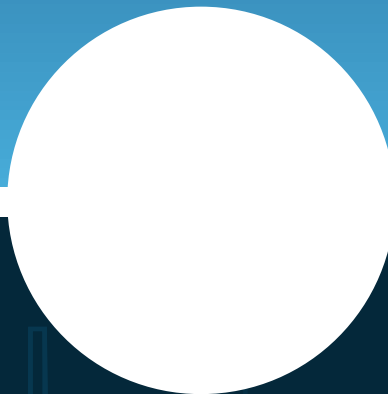Rana.Biswas@equisoft.com

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Book a meeting

Equisoft is a Leading Global Technology Provider for Insurance Distributors

Our decades of experience go into the advanced digital solutions that help you manage all aspects of your insurance sales process. We deliver integrated solutions – from life insurance carrier core systems and sales solutions, to agency management systems, to advanced front-end tools for agents, advisors and brokers—that help all industry stakeholders solve the biggest challenges they face today.

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