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Easy to implement policy administration software that's packed with modern features and ready to go to work

Developed to deliver rapid transformation without the risk

# Equisoft/manage

Equisoft/manage is a SaaS policy administration solution using low-risk, production-ready digital business processes.

“ Implementing a flexible and scalable policy administration platform with a user-friendly servicing portal was a key component in our strategy. This is the first phase of a multi-phase initiative that will transform NWL’s business into an efficient digital model. ”

– Greg Owen, SVP & CIO, National Western Life





## PAS Implementation Complexity and Upfront Costs Solved in a Cloud Enabled Platform

Modernize your PAS with Less Risk.

### **Off-the-Shelf Solution for Life and Annuity Products**

- ▶ Off the shelf life, annuity & final expense insurance products built-in and ready to launch, including products with indexed funds and a wide array of plug-and-play product features.
- ▶ Best-of-breed design of core administration business processes, taken from years of implementation experience with over 35 carriers.
- ▶ Rapid time-to-market for future product variations.

### **Third Party Integration to All Leading Services**

- ▶ MIB, Milliman, Salesforce, USPS, LexisNexis, PeopleSoft, DocuSign, ACORD and many more.



## Core PAS That Needs Less of Your Budget, and Even Less of Your Time

Put Your Core System on Autopilot So You Can Focus on Growing Your Business.

### **Unheard of Implementation Speeds**

- ▶ We've transformed clients with complex annuity products, and data migration in 6 months.

### **Simplified Maintenance and Operations to Reduce Cost of Ownership**

- ▶ No need for cloud architects, advanced CI/CD expertise, and little involvement from your IT staff.



## A Supercharged, Digital End to End Experience

Equisoft/manage is built on the Oracle Insurance Policy Administration platform, and turbo charged with a state-of-the-art self-service portal for advisors, agents, plan administrators, participants and individual customers!

### **Simplify Your Core System Footprint with a Modular Implementation**

- ▶ Consolidate end to end management of your agency, commissions, compensation and claims with our modular approach to Policy Administration System implementation.

### **Costs scale to number of policies hosted on the platform**

- ▶ Allows for costs to scale down to carriers of all sizes.



## Wondering What Makes Equisoft/manage Better? This Will Help.

- ▶ Transformation without the headaches
- ▶ A single, end to end platform
- ▶ Functionality for life and annuities
- ▶ Lower upfront capital costs
- ▶ Out of the box portal for agents & customers
- ▶ Supports multiple languages & currencies
- ▶ Customizable design

**Equisoft is a leading global technology provider for insurance carriers, distributors and advisors. 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 advisors and brokers – that help all industry stakeholders solve the biggest challenges they face today.

## Connect with us to learn more:

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## About Equisoft

Founded in 1994, Equisoft is a global provider of advanced insurance and investment digital solutions. Recognized as a valued partner by over 250 of the world's leading financial institutions in 16 countries, Equisoft offers innovative front-end applications, extensive back-office services and unique data migration expertise.

[equisoft.com](https://equisoft.com)

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