InsuranceElements is an integrated suite of web-based and mobile front office tools for insurance companies to help manage every element of their financial advisors’ sales process.

- Quick ramp-up of illustrations products through Accelerators
- Multiple platforms, yet only one consolidated solution
- Online web and disconnected
- Industry-leading user interface
- State-of-the-art technology (RIA)
- Low cost of ownership
- ACORD-based data exchange
- Ability for insurance carriers to become autonomous with regard to the configuration

www.equisoft.com/insurance
Flexible Design

Customize the user interface by distribution channel, product and/or product groups to reflect your company’s specific look with a state-of-the-art user interface experience. Discover the ease of use with our interface as well as the dynamic modern graphics with our industry-leading reports. Easy to understand, attractive reports that helps emphasize up-sell and cross-sell opportunities.

Extensive Plug-and-Play Features

Choose from a set of components to build your product separately and highlight certain characteristics. Add dynamic graphs and pre-built illustration models for complex products, add “Quick Compare” to compare simple term products, configure the results to highlight certain benefit projections, etc.

Common Calculation Engine

Benefit from EquiSoft’s disconnected version of Oracle Insurance Calculation Engine (OICE). When the insurer has Oracle Insurance Policy Admin (OIPA), the common calculation engine and configuration rules are shared between illustrations, underwritings and policy administration, ensuring accuracy and speed to market; products are configured using the Oracle Rules Palette, allowing easy product implementation. InsuranceElements can also integrate with your existing calculation engine for rapid deployment of attractive web interfaces, and disconnected interfaces and reports.
Straight-Through Processing

Apply for the policy in real time with the Electronic Application element. Import illustrations and client data automatically from the Illustrations element, from CRM or start blank! Electronically or vocally sign forms for submission or intermediary underwritings. The workflow capabilities along with multiple integration points support and facilitate different straight-through integration models.

Flexible Data Entry

Easily configure the data entry process to best fit the natural entry order, without being bound to the application form order. Quickly define dynamic web questionnaires with required or conditional questions, sections or complete optional form as well as complex field layout, masks, fonts and colours without code changes.

Configuration Engine

Configures application forms without requiring changes to the source code. This allows for independent form configuration and quicker time to market. It also supports different versions of the forms, making it an Electronic Application that easily and quickly adapts to users’ feedback and experiences.
InsuranceElements offers completely innovative producer tools with **connected and disconnected use**

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**Multi-Platform Web Compatibility**

Use any platform to create illustrations, quotes or electronic applications. The web version supports all major browsers and provides views defined for specific devices, making it possible to run from a tablet or smartphone. With the addition of the mobile QuickQuote, this forms an integrated multi-platform solution with synchronization capabilities.

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**Disconnect Feature**

Use our disconnect feature to run full illustrations and fill out application forms without Internet access. Illustrations and application data will synchronize when Internet is accessible. EquiSoft uses a unique approach that enables a one-time configuration of products and rules for seamless distribution to both online (web) and an Internet disconnected PC.

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EquiSoft specializes in business services and solutions that address the needs of the insurance industry. EquiSoft develops and markets InsuranceElements to support sales illustrations and quoting, electronic application, financial planning, asset allocation, on both web-based and mobile platforms, thus providing solutions that span the complete chain value for life and annuity carriers.

EquiSoft also integrates and supports Oracle Insurance solutions. EquiSoft provides insurance companies with technology experience and expertise. As a Gold Level Oracle partner and the only global specialized integrator for the Oracle Insurance Policy Administration solution, EquiSoft has deep expertise in processes within new business, underwriting, compensation management, policy service and claims management.

With offices in the United States, Canada, Latin America, the Caribbean and South Africa, EquiSoft not only offers proximity to its customers, but has a critical understanding of the local financial environment.

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**EquiSoft**

SOLUTION-DRIVEN INNOVATION

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<thead>
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<th>United States</th>
<th>Canada</th>
<th>Chile</th>
<th>South Africa</th>
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<tbody>
<tr>
<td>1-267-989-3141</td>
<td>1-514-989-3141</td>
<td>56 2 2570 9652</td>
<td>27 (0) 83 4 595 795</td>
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