



Vertafore

Driving Results for Associations
and Aggregators

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They count on you. You can count on us.

It's our mission to provide exceptional service and powerful insurance technology so you can focus on what matters to you – people.



Focusing on
our customers



Delivering results
that make a
difference



Demanding
operational
excellence

Solutions for the entire insurance distribution channel

Rating &
Connectivity

Content Management
& Workflow

Data &
Analytics



Insureds/
Consumers



Agencies/
Brokers



MGAS



Carriers



States/
Regulators

Compliance
Management

Management
Systems

Insurance
Knowledge Base

Our Focus

- Build strong relationships with our current associations
- Dedicated team for exceptional support
- Future investment to bring continuous value



Championing the Independent Agent

You're in good company

We serve more insurance industry customers than anybody else.

150,000+

Management
System Users

200m+

Carrier rating
transactions

95,000+

Workflow
Users

20,000

Agencies

477

MGAs

1,000

Carriers

500,000

Insurance
Professionals

23

State
Governments

50+

Association
Partnerships



8 of the top 10
brokerages use BenefitPoint.



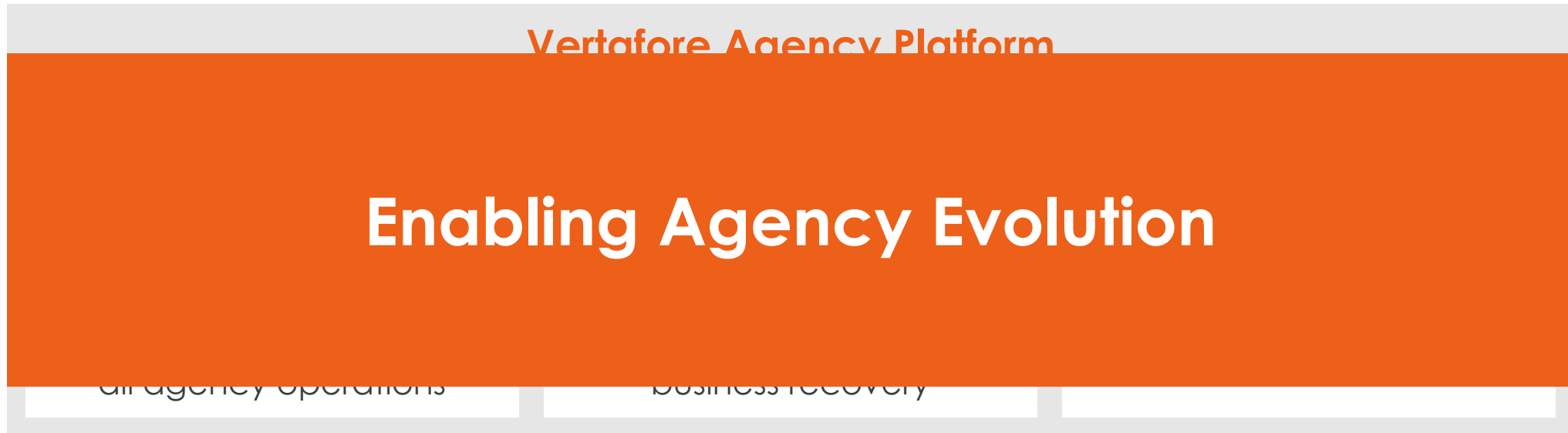
45 of the top 100
brokers partner with
Vertafore for workflow
management.

65 of the top 100
brokers partner with
Vertafore for an agency
management system.



50% of industry transactions
for producer compliance
are handled by **Sircon**.

Agency product vision



AMS360

The foundational agency management system for your core business functions

- Increase employee efficiency with guided workflows
- Make data-driven decisions to grow your book
- Keep up with your business no matter where you are
- Access carriers in one place, without multiple logins
- Communicate with customers the way they prefer



QQCatalyst

QQCatalyst is an agency management system for independent agents needing **operational, marketing,** and **sales pipeline management** tools.

Easy **client & policy management**

Built-in **sales & marketing automation**

Effective employee **productivity tools**

Which provides

Strong customer relationships

Effective business management

Enabling agencies to **focus on growing their book of business**



Personal Lines Rating

Delivering Results that Make a Difference



Today!

- ***Largest Carrier footprint*** – over 300
- Ability to rate in ***48 states + DC***

2019 Priorities

- Over ***12,000 agencies***
- ***Rating API***

Bringing the most powerful Rater to the market

What is ReferenceConnect?

ReferenceConnect is the only insurance knowledge base with over 40 trusted insurance sources, **enabling agencies** to:

Aggregate industry
information

Centralize agency
documents

Access carrier
forms

Which provides

Opportunities into niche
lines of business

Superior customer
service

Enabling agencies to
write new business faster and more accurately



RiskMatch will empower firm's growth

Executive & Manager Growth Exploration



Better understand your revenue streams and how to maximize



Better manage your carrier relationships

Producer & Account Manager Growth Execution



Greater Client Have more productive client meetings



Develop targeted cross-selling strategies into your client base



Win more new business with greater industry and product expertise

Thank You

