Employee Pooling

INSURANCE-FOCUSED BUSINESS PROCESSING SOLUTIONS

Carriers | Distributors | Financial Institutions| Software Companies
Life | Annuity | LTC | DI | Medicare | Health

OUR VISION

EP strives to be the leader in managing data and cultivating strategic relationships across the insurance and financial services ecosystem, connecting insurers, distributors, marketing organizations, financial institutions, and technology providers.

WHAT WE DO

EP integrates cutting-edge technology with expert human capital to automate processes, drive efficiency, and reduce costs, effectively bridging manufacturing and distribution. Our secure process management systems provide streamlined solutions tailored to your business needs.

HOW WE CAN HELP YOU

By partnering with EP, the burden and costs associated with hiring, training, and retaining skilled employees are transferred to us. We eliminate the unpredictability of scaling to meet service standards and offer flexible scaling options at variable costs. Additionally, we help eliminate outdated or underutilized software, improving performance and tracking methods. Our team of industry software experts can assist companies in transitioning to, maintaining, and maximizing robust platforms.

PROCESS MANAGEMENT SYSTEMS & SOLUTIONS

Carriers | Distributors | Financial Institutions| Software Companies
Life | Annuity | LTC | DI | Hybrid | P&C | Medicare | Health

DEDICATED & EXCLUSIVE
Choose between dedicated staff who consistently manage your queue or exclusive team members who work solely for your firm.

FRACTIONAL SHARES
We sell full-time equivalents (FTEs), not whole units. Pay only for services delivered.

DEPARTMENTAL SPECIALISTS
Your dedicated specialists will be fully trained in your system and the department to which they are assigned.

MANAGEMENT HIERARCHIES
Experienced team leaders and our corporate executive team manage and supervise our teams.

SCALABILITY
Adjustable platform based on your business workflow.

VARIABLE RATE
Reducing costs and increasing efficiencies at a fraction of the cost.

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PROCESS MANAGEMENT SYSTEMS & SOLUTIONS

1. ## AGENT CONTRACTING
   - Building and data-entering profiles in AMS
   - Managing agent/agency demographic details
   - Managing missing/needed requirements
   - Scrubbing and processing agent/agency appointments
   - Conducting follow-ups until writing code is issued
   - Virtual Assistance - Managing agent address and EFT bank changes, updating E&O and AML renewals, processing bulk hierarchy moves, auditing non-production lists, agents, and special projects.

2. ## NEW BUSINESS *(Life, Annuity, LTC, Hybrid, DI, Medicare, Simplified & Guaranteed Issue)*

   APPLICATION PROCESSING -
   - **PDF Life Applications** – Scrubbing, ordering medical records and exam requirements, imaging, and doc-typing, building the case in CMS. Submitting in-good-order applications and flagging not-in-good-order applications.
   - **Paper Annuity Applications** – Full scrub and suitability scrub for financial questionnaires.
   - **E-Applications (i.e., Ticket/iGo/Firelight)** – Checking contracting status in the CMS, updating or building the case in the CMS, submitting the application to the carrier, and saving a copy to the customer's document storage location.

   CASE MANAGEMENT – From Submission to Commission
   - Level 1: EP Auto-Feed System—AMS/Carrier Synchronization
   - Level 2: Advanced Case Management (Includes Level 1)
   - Level 3: The Virtual Case Manager (Includes Levels 1-2)
   - Level 4: The Virtual New Business Department (Includes Levels 1-3)

3. ## UNDERWRITING
   - Prequalification and management of Informals
   - Shopping Rated Cases
   - Medical record summaries
   - Electronic and traditional medical record retrieval
   - Electronic access to reports of individuals' prescription drug and lab data, names of prescribing and ordering physicians, plus actuarial data
   - Case consultation and assessments

4. ## COMMISSION RECONCILIATION & REPORTING

   COMMISSION PROCESSING

   - Level 1 (Basic) - Download, process, import statements, and Quick add missing policies in CMS.
   - Level 2 (Intermediate) - Identify and research discrepancies
   - Level 3 (Advanced) - Resolve discrepancies and run reports

   COMMISSION BUILDOUTS
   - Take advantage of the capabilities of your commission module by having EP custom build and maintain a comprehensive commission reconciliation and reporting system.

5. **POLICY SERVICES**
   - Policy Notification Management
   - Policy Changes
   - Virtual Assistance – Research and Agent Requests

6. **POLICY MONETIZATION & MANAGEMENT**
   - Cleaning the Inforce Book
   - Updating Insured's Contact Information
   - Sales Campaigns
   - Marketing

7. **LIFE SETTLEMENT**
   - File Preparation
   - Pre-Shopping a Case
   - Case Management & Documentation
   - Underwriting
   - Closing
   - Post-Closing
   - Policy Maintenance to Maturity

8. **SPECIAL PROJECTS**
   - Suitability Form Data Transfer
   - Adjust Hierarchy Management Alignment/Changes in AMS/CMS
   - Confirm "Active vs Terminated" Policies
   - Append CRD # to Appropriate Agent Records
   - Append NPN # to Agent Records
   - Fulfill In-Force Requests and Load Into AMS/CMS
   - Confirm Agent Record — Active/Inactive
   - Update Client Records with "As Sold" Policy Values (10/20/30 Years Expected)
   - Bulk Hierarchy Changes (Mergers & Acquisitions)
   - Data Migration

9. **CALL CENTER SOLUTIONS**

   Call Center team members are highly trained to provide exceptional outbound call support for various essential services.
   - 1035 Transfers
   - Agent Contracting Follow-Ups
   - Case Management
   - Post-Issue & POS
   - Commissions
   - APS Status
   - Special Projects

PROCESS MANAGEMENT SYSTEMS & SOLUTIONS

10. SOFTWARE TRAINING & CONSULTING

Our goal is to assist companies in identifying, integrating, and maintaining technology. We proactively stay ahead of technological advancements to ensure our clients fully maximize their platform's capabilities.

EP's exposure to numerous systems through support to our customers gives us a unique ability to provide coaching, training, and expert guidance on a wide range of software platforms.

ACT - AGENCYBLOC – AGENCY INTEGRATOR – AGENT FRONT - AGENTSYNC - AMS - APPLICINT - ARC - BIGIN – BROKER BACK OFFICE – COMMISSIONS DUE – CONSTANT CONTACT - CORE - CRATCHIT – EMPLOYEE NAVIGATOR - ENSIGHT - E-SMART – GLOBAL RELAY – GOOD HIRE - HUBSPOT - iVIEW - KWANTI – MICROSOFT DYNAMIC - NITROGEN - ONEDRIVE - ONEHQ – OPT SOFT - PAPERCLIP - PAYMASTER - PODIO - PROFORMEX - PROFOUND - QUICKBOOKS – RENT PRO - RISKALYZE - RIVUE – SALES LOGIX - SALESFORCE - SHAREFILE - SHAREPOINT - SIMKONET - SMARTOFFICE - SPOKEO - SURELC - TECHFICIENT - TKT - VENMINDER - VERTIFORE - WEBDOCKS - WINFLEX - WINTOUCH - ZEBU - ZENDESK - ZILLOW – ZOHO

Abbreviated listing

NEW DELHI & MOHALI SHIFTS

- Evening Shift 11:00 pm - 8:00 am CT
- Mid-Day Shift 2:00 am - 11:00 am CT
- Day Shift (US Business Hours) 7:00 am to 5:00 pm CT

A $12.36 per day prorated surcharge ($1.55 per hour) compensates Day Shift teams for transportation and meals.

PROCESS MANAGEMENT SYSTEMS & SOLUTIONS

L&C / AGENT CONTRACTING SYSTEM

COMPREHENSIVE AGENT APPOINTMENT PROCESSING
- Full-scrub new business and JIT contracting, data entry in CRM and L&C System, submit *in-good-order* appointment packet to the carrier
- Manage agent appointment contracting from carrier receipt to writing code retrieval

Front-End Agent Appointment Processing
- Full-scrub, data entry in CRM and L&C System, submit *in-good-order* appointment packet to carrier

Back-End Agent Appointment Management
- Manage agent and agency correspondence, contracting status updates via carrier website, email, phone
- Updating systems with agent writing codes

Virtual Assistance
- Manage producer address changes
- EFT bank changes
- AML and E&O renewals
- Bulk hierarchy moves
- Auditing non-production lists/agents
- Special projects

CONTRACTING PROCESS

1. Data-enter appointment packet into the agency's AMS and forward the contracting link to the agent for approval.

   - Upon receipt of any new appointment request, EP will build out the agent profile and respective carrier's appointment if not already created.
   - After confirming the hierarchy structure in SureLC, we send the agent a *review* link to answer all background questions and to apply their signature on the contracting paperwork.
   - Once the agent completes and confirms the link, EP will begin the appointment process.

2. Manage appointment packets through carrier processing.

   - Submit the *in-good-order* packet to the carrier.
   - Manage pending requirements through consistent carrier follow-ups.
   - Retrieve agent writing code and update AMS and L&C System.
   - Upload email confirmation to AMS and email appointment completion to the agency.
   - Update E&O and AML renewals.

Proficient in SureLC, Vertafore, AgentSync, and all other software systems

PROCESS MANAGEMENT SYSTEMS & SOLUTIONS

NEW BUSINESS SYSTEM – APPLICATION PROCESSING & CASE MANAGEMENT

APPLICATION PROCESSING — Getting the application to the carrier
- Paper Life Applications — Getting the application to the carrier in full or in-good-enough-order scrub, order front-end exams and medical records due to age and face requirements, build, image, doc-type, submit if in-good-order, return with errors noted if not in good order, and save applications. Work is completed before the next business morning.
- eApps — Checking the licensing/contracting in the CMS, updating the case if already in the CMS or building the case if not in the CMS, submitting the application to the carrier when/where applicable, working inside a customer's queue, and saving a copy to BGA's document storage place.

CASE MANAGEMENT — From carrier receipt to case closed

Level 1: EP Auto-Feed System —Thoughtful and Professional

1. Match changes in carrier websites to the case in the Case Management System
2. Match changes in vendor (APS and exam) websites to the CMS
3. Alert BGA when the case is found on a carrier website but is not in the AMS
4. Alert the BGA case manager when the carrier takes any negative action
5. Manage each case until the carrier closes the file
6. Update modal and target premiums and face and plan details when the case is approved and before placing case inforce

Level 2: Advanced Case Management (Includes Level 1)

1. Include the application question in requirement notes when an answer to a yes question is required
2. Download and send completed exams and APSs to carriers and save them for BGA
3. Order medical records and any additional exams per carrier request
4. Pull and provide additional forms requested by the carriers
5. Quick-build cases found in the carrier websites that are not in the CMS due to agents/agencies directly submitting their cases to the carriers
6. Provide alerts to BGA CM according to defined service standards
7. Provide *other-than-applied* and *better-than-applied* approval illustration
8. Pull underwriting files (app, exam, APS, etc.) on ticket cases, if available on the carrier website, and save to the BGA document storage location
9. Manage e-policy/policy delivery packets (if available on carrier website) and save them to document storage location

Level 3: The Virtual Case Manager (Includes Levels 1-2)

1. Manage command center according to defined service standards, call carrier when needed, work follow-ups, and alert BGA case manager if necessary. (The BGA case manager will retain responsibility for pushing memos)
2. Manage requirement replies and forms, requests, and questions from agents that internal CM delegates to their virtual case manager

Level 4: Virtual New Business Department (Includes Levels 1-3)

1. Manage new business email account
2. Push status memos to the agent

PROCESS MANAGEMENT SYSTEMS & SOLUTIONS

NEW BUSINESS SYSTEM – APPLICATION PROCESSING & CASE MANAGEMENT
ANNUITY

ANNUITY APPLICATION PROCESSING — Getting the application to the carrier
- Paper Annuity Applications — Getting the application to the carrier in full scrub or full scrub with the addition of suitability scrub for financial questionnaire completeness, accuracy, and acceptability of answers.
- eApps — Checking the licensing/contracting in the CMS, updating the case if already in the CMS or building the case if not in the CMS, submitting the application to the carrier when/where applicable, working inside a customer's queue, and saving a copy to BGA's document storage place.

ANNUITY CASE MANAGEMENT — From carrier receipt to case closed

Level 1: EP Auto-Feed System — Thoughtful and Professional

1. Match changes in carrier websites to the case in the Case Management System
2. Call carriers to obtain status when the website provides incomplete or no details
3. Alert BGA when the case is found on a carrier website but is not in the CMS
4. Alert the BGA case manager when any negative action is taken by the carrier
5. Manage each case until the carrier closes the file

Level 2: Advanced Case Management (Includes Level 1)

1. Include the application question in requirement notes when an answer to a yes question is required
2. Pull and provide additional forms requested by the carriers
3. Quick-build cases found in the carrier websites that are not in the CMS due to agents/agencies directly submitting their cases to the carriers
4. Provide alerts to BGA CM according to defined service standards

Level 3: The Virtual Case Manager (Includes Levels 1-2)

1. Manage command center according to defined service standards, call carrier when needed, work follow-ups, and alert BGA case manager if necessary. (The BGA case manager will retain responsibility for pushing memos)
2. Manage requirement replies and forms, requests, and questions from agents that internal CM delegates to their virtual case manager

Level 4: The Virtual New Business Department (Includes Levels 1-3)
1. Manage new business email account
2. Push status memos to the agent

PROCESS MANAGEMENT SYSTEMS & SOLUTIONS

UNDERWRITING SYSTEM

EP UNDERWRITING TOOLBOX

Risk Identifier (RiskID) — Includes physician-ordered labs, prescription drug history, Hannover Re rating class assessment overlay, risk scoring, and other actuarial data; Hannover Re results are based on labs only. *(*Rx database supported by top PBM's - Lab history supported by Quest Diagnostics and LabCorp)*

Medical Claims Data — Detailed information and records related to the health-related claims submitted by policyholders

Healthcare Professionals — Prepare carrier-certified medical record summaries with corresponding APS page numbers for quick reference to additional details and context.

Underwriters — US-based, multi-carrier, and BGA-experienced underwriters, available for case consultation, assessments, life expectancy services, and advocacy.

Traditional Medical Record Retrieval—most secured in $\leq$ 10 business days.

Rated Cases—Getting an offer you can place rapidly

- Summarize the medical records and other mortality data; summarize the summary for quick quote submission—1-to-2-day business morning turnaround

- Blind email the Quick-Quote to secure tentative offers—2 business days to receive and present findings

- If the proposed insured has multiple impairments, submit a full summary to confirm tentative offers—2 business days to lock down the offer

  - Have EP Underwriter assess the case and advise how to proceed (optional)

  - Prepare and submit formal paperwork (optional)

  - Provide case management (optional)

Accelerated Informals—24-hour turnaround

Collect Data – HIPAA Authorization, RiskID, and Informal Health Questionnaire (optional)

*The RiskID report Includes physician-ordered labs, prescription drug history, Hannover Re-rating class assessment overlay, risk scoring, and other actuarial data; Hannover Re results are based on labs only. *(*Rx database supported by top PBM's - Lab history supported by Quest Diagnostics and LabCorp)*

Evaluate, Assess, and Prepare – Our healthcare team will summarize medical records and mortality data and then summarize the summary for Quick Quote submission. EP's underwriting team provides a comprehensive risk summary and assessment of the collected data.

*RiskID can be obtained separately, without Underwriter evaluation, if the agency utilizes an in-house Underwrite

PROCESS MANAGEMENT SYSTEMS & SOLUTIONS

COMPREHENSIVE COMMISSION RECONCILIATION AND REPORTING SYSTEM

COMMISSION ACCOUNTING
Statement Processing, Reconciliation, Reporting, and System Maintenance

- **Level One—Deposit Reconciliation and Reporting—**EP will download statements from carrier websites, convert them into Excel, and import them into the CMS. EP will also quick-add policies that are in the statements that do not have a corresponding policy record in the CMS.

- **Level Two – Commission Reconciliation –** EP will reconcile the policies (match the expected with the actual). EP will prepare a discrepancy report listing any concerns and their suggested resolutions. The client will then take all the required steps to resolve the concerns.

- **Level Three – End-to-End Commissions Accounting –** EP's Commission managers will perform the required steps to resolve commission concerns by searching for information on carrier websites, contacting carriers via email/phone, etc. EP will ask the client for help in resolving commission discrepancies when these methods do not clarify the cause. EP will consolidate all the processed statements and run BGA Pay (Accounts Payable), BGA earnings, and other reports based on the client's demand and the system's capabilities.

COMMISSION BUILDOUTS
EP has a comprehensive commission reconciliation and reporting solution and can custom-build a system to integrate with your agency management system (AMS).

Buildout contract consists of the following:

- Building gross revenues: carrier max, IMO, and carrier bonuses
- Building carrier levels and creating agent and sub-BGA commission schedules
- Attaching schedules to agents
- Attaching agents to their hierarchies and building special deals
- Providing one month of audited commission reporting
- Deliver the same to all designated carriers
- System training

After buildout and audit commitments are fulfilled, EP will provide ongoing commission processing and reporting for three months to eliminate recurring discrepancies:

- Pull statements from the carrier websites
- Convert any PDF statements into Excel
- Convert statements into a common format for import into the commission system
- Quick-add cases not found in the CMS
- Run the actual Commissions Received vs. Commissions Expected report and resolve discrepancies
- Post the batch after the statement is processed and validated
- Run the Agent Payable and BGA Revenue reports
- Generate a .csv file of downline payout amount and details that can be imported into the client's payroll system (e.g., QuickBooks)
- Build additional reports based on the system's capabilities (e.g., Expected-but-Not-Paid Report, Expected Revenue, etc.)

PROCESS MANAGEMENT SYSTEMS & SOLUTIONS

COMPREHENSIVE COMMISSION RECONCILIATION AND REPORTING SYSTEM
Continued

COMMISSION BUILDOUTS continued

EP will provide ongoing system maintenance and support, including weekly commission processing and reconciliation, agency revenue reports, and agent bonus reports:

- Update changes to GA Schedules and agent schedules
- Update carrier product and rate changes
- Update changes to hierarchies and special deals and build new producer relationships
- Build out additional and new carrier relationships

POLICY SERVICES

- Policy Notification Management - Getting policy notices to the agent
- Sorting/Pulling, forwarding to the agent, documenting in CMS, and saving the notice.
- Policy Changes - Managing Change Requests from agents to carriers
- Forwarding to the carrier, documenting, and following up until the carrier processes the change.
- (Example: beneficiary, bank, owner changes, etc.)
- Virtual Assistance with research and agent requests
- Statement and Illustration ordering, Re-Proposals, Paid-to-Dates, Contract details, Policy values, Conversion options, Sales support, Policy monitoring, Performance alerts, etc.

POLICY MONETIZATION & MANAGEMENT SYSTEM (PMM)
EP's turnkey PMM helps agents and agencies find new revenue sources from their existing clients while ensuring the policy owner's existing insurance coverage continues to meet expectations.

POLICY MONETIZATION

- **Cleaning the Inforce Book**

  - Segregate inforce and lapsed policies through Carrier and DTCC feeds

  - Data from the client's CMS, EP Policy Management System, and carriers are sorted and merged into BGA CMS

- **Updating Insureds' Contact Information**
  - Current mailing address, phone number, and email address
  - Current wealth scoring (Income, Wealth Index, Ability to Pay)
  - Current consumer intent to buy based on social media activity – refreshes monthly

- **Sales Campaigns**
  - Example, but not limited to End-of-Term & Conversion Periods, Supplemental Retirement Income, and Life Settlement

- **Marketing**
  - Maintain contact with insureds and policy owners (e.g., Birthday cards, industry updates, and education)

PROCESS MANAGEMENT SYSTEMS & SOLUTIONS

CALL CENTER SOLUTIONS

Our dedicated EP team manages thousands of calls weekly. Rest assured, your business is entrusted to capable and compassionate hands.

Each member of our Call Center team undergoes extensive training, ensuring the delivery of exceptional outbound call support across a diverse array of services.

Key Services Include:

- Follow-ups for 1035 Transfers
- Agent Contracting Status Updates
- Case Management Updates
- Post-Issue and Point of Sale Calls
- APS Status Updates
- Commission Issues
- Special Projects

* Calling Services are available for special projects of any scale or complexity, providing comprehensive support tailored to your unique needs.

SPECIAL PROJECTS

EP can manage and execute numerous special projects across your organization's spectrum. Our Special Projects team is exceptional at providing operational support for various tasks regardless of the project's size.

Examples:

- Suitability Form data transfers
- Hierarchy Management alignment/changes in AMS/CMS
- Confirm "Active vs. Terminated" for all policyholder cases in AMS/CMS
- Append CRD # to each appropriate agent record
- Append NPN # to each agent record
- Fulfill in-force requests, input to AMS/CMS
- Note agent records in AMS as Active (business within 18 months) or Inactive (no business within 18 months)
- Update client records with "as sold" policy values (10, 20, 30 years expected)
- Bulk hierarchy changes (mergers & acquisitions)
- Pre-shopping Life Settlement cases — Identify policies up for renewal, lapsed, etc., file assembly and redaction
- Data Migration between AMS Platforms — Exporting and formatting data, correcting data entry errors, importing data to target AMS, conducting a thorough review of the imported data

PROCESS MANAGEMENT SYSTEMS & SOLUTIONS

LIFE SETTLEMENT SYSTEM

For Providers, Buyers, and Brokers

CASE MANAGEMENT
- Building the File — Information from the illustrations, annual report, application, and other policy-related documents for the insured, owner, and policy is gathered to build a case in the firm's Case Management System (CMS). EP imports all case data, creates a digital record, attaches provided documents, and tracks the case through post-closing.
- Document Scrubbing— Supplier, owner, insured, and agent information is redacted from all documents to keep your client and case information safe from competitors.

UNDERWRITING
- RiskID Report— Includes prescription drug and clinical laboratory history, prescribing and referring physician names, and mortality scoring. EP utilizes the RiskID platform, which provides health history data in a scoring model that produces real-time, health-driven results for the insured. This information is a fast, proven way to provide medical details necessary to determine a case's outcome.
- Medical Record Retrieval—EP will obtain 90%+ records within ten business days…more than 50% within five business days.
- Medical Record Summaries--EP creates a summary of the medical records and provides a concise document containing the medical conditions, anticipated life expectancy, and an overall medical picture of the insured.
- US-based Underwriter Life Expectancy Assessment: A qualified life settlement underwriter will evaluate all medical data received and provide an opinion on where the life expectancy falls on the bell curve.

PREPARATION FOR CLOSING
- Prepare the Purchase-Sale Agreement, e.g., escrow agreement, life settlement agreement, HIPAA, spouse release form, and all other related forms, and have them ready for signature.
- Prepare the carrier-related documents to be included with the Purchase Sale Agreement, e.g., change of ownership, change of beneficiary, term conversion, and all other related forms. Note: There can be dozens of legal and carrier documents and hundreds of pages in the closing files.

POST-CLOSING POLICY CHANGES
- Final scrubbing of the Purchase-Sale Agreement to ensure the documents are in good order.
- Submit the signed authorization and change forms to the carrier.
- Follow up with the carrier until the carrier confirms all changes have been executed.
- Obtain the confirmation letter from the carrier.

POLICY MAINTENANCE TO MATURITY—Ongoing Provider Support
- Annual medical review and updated life expectancy.
- Run new RiskID, retrieve medical records, and reassess life expectancy.
- Obtain annual policy statements, inforce ledger, and proposals upon request.

PROCESS MANAGEMENT SYSTEMS & SOLUTIONS

SOFTWARE TRAINING & CONSULTING SOLUTIONS

AMS CUSTOMIZATION

EP offers an array of customization options for your AMS, tailoring the system to meet your specific needs down to the smallest details. Our comprehensive customization covers:

- Dashboard Creation
- Custom Letter Templates
- Page Layout Adjustments
- Reports Generation

OPERATIONS TRAINING (BGA/IMO STAFF)

EP is your product support, training, and consulting solution across various insurance software platforms. EP eliminates the complexities of working with multiple software companies (SmartOffice, Agency Integrator, Agency Bloc, 1HQ, SureLC, Paperclip, Zoho, etc.) for the training process and facilitates optimal utilization and integration of all software platforms within your agency. Our tailored program covers:

- New Business Case Management
- Commissions
- Licensing & Contracting
- Inforce Policy Management (POS/PHS)
- CRM

SOFTWARE TRAINING

Technology in our industry is rapidly changing. We make it our responsibility to:

- Identify best-in-class solutions
- Help agencies identify, integrate, train, and maintain technology.
- Connect the gaps in technology with thoughtful, professional Human Capital

EP offers optional hosting and management of Agency Management Systems (AMS) in addition to leveraging existing customer systems. Our comprehensive AMS services include the following:

- CRM
- L&C
- Case Management
- Underwriting
- Commissions
- Policy Management
- Reporting

PROCESS MANAGEMENT SYSTEMS & SOLUTIONS

EP SMARTSOURCE CRM & SOFTWARE PROFICIENCIES

EP holds extensive mastery of CRMs utilized across the life industry today, whether large or small. Our knowledge and expertise of these software platforms and several homegrown systems reduce the learning curve when managing your operations tasks.

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Abbreviated listing