

# STAY INFORMED, STAY AHEAD



## ORDER ENTRY AND SUITABILITY

WEBDIRECT AND AFFIRM® FOR ANNUITIES



## TRACK CARRIER STATUS

ONEVIEW™



## AGENCY MANAGEMENT AGENCY INTEGRATOR



## E-DELIVERY DOCFAST®



## IN FORCE TRANSACTIONS BOOK OF BUSINESS AND IFTs

Introducing **OneView™**, a breakthrough solution that empowers agents/advisors with a unified and real-time view of their carrier's order statuses – all in one convenient location.

OneView provides you with the tools you need to monitor, notify, and fix annuity orders seamlessly and in every step of the process.

This comprehensive solution makes it simple and efficient to manage the status of pending annuity orders in real-time. With OneView's streamlined dashboard, you can now easily track orders and quickly make any necessary changes while drastically minimizing calls and emails with carrier support staff.

Say goodbye to complexity, frustration, and anxiety – and hello to increased efficiency, added confidence, and faster cycle times with OneView.

## FEATURES



Real-time order tracking at the carrier level



Centralized dashboard simplifies application tracking – across multiple carriers



Innovative user-friendly dashboard enables financial advisors to quickly identify orders that require immediate actions



Solution provides all the tools to monitor, notify, and rectify annuity orders



Uses standardized carrier workflow across the industry for improved communication – (such as License, Appointment and Training Review, Document Review, Suitability, and Funding)



Carriers provide agents with real-time, product-specific feedback, empowering them to address issues immediately

## BENEFITS



Improves the transparency of the process by providing real-time status insights, centralized updates, and standardized procedures from across carriers



Reduces cycle times and NiGOs while boosting efficiencies by minimizing calls, streamlining data, and eliminating inconsistencies



Reduces necessary calls, as well as minimizing call volumes and call lengths



Enables distributors to view their status of suitability while monitoring funding status



Less time spent following up with carriers – and more time spent servicing clients



Reduces admin costs of managing carrier call volumes



## SCHEDULE A DEMO

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