

# ELEVATE EFFICIENCY, ENSURE COMPLIANCE









**AFFIRM® for Life** is a wizard-driven workflow automation solution designed primarily for broker-dealers processing life insurance through multiple BGAs. This solution empowers you to efficiently manage tasks, such as creating reporting books of records and providing evidence of suitability and supervision, while adapting to the constantly evolving regulatory environment.

This solution also facilitates tailored compliance reviews, ensuring alignment with the requirements of regulated broker-dealers.






With seamless integration capabilities, AFFIRM for Life connects with broker-dealers, BGAs, third-party vendors, and other iPipeline solutions, including Agency Integrator, DocFast®, AlphaTrust®, and Illustrations. This ensures a cohesive workflow and maximizes operational efficiency.

Experience the next level of empowerment for broker-dealers through AFFIRM for Life. Simplify your workflows, elevate compliance standards, and lead the way in the financial services industry.

## FEATURES

-  Self-servicing abilities for orders, questions management, forms mapping, and workflows
-  Common data model across all carriers and distributors
-  Customized workflows and suitability reviews to ensure SEC, FINRA, and state compliance
-  Powerful e-signature integration
-  Real-time updates to users and business partners
-  Standardized compliance approach for validation, surveillance, and supervision across all sales

## BENEFITS

-  Bridges broker-dealers and BGAs, streamlining life insurance tracking for enhanced compliance and efficiency
-  Integrates with broker-dealers, BGAs, and third-party vendors
-  Data is pre-filled via the wizard interface
-  Reduce admin cost
-  Flexible configurations and branding to provide customized user experience options
-  Allows carriers to manage multiple product versions (PPfLs)



**SCHEDULE A DEMO**

[www.ipipeline.com](http://www.ipipeline.com) | [sales@ipipeline.com](mailto:sales@ipipeline.com) | 800.758.0824

