Why iPipeline?

DON'T JUST TAKE IT FROM US.
HEAR FROM OUR MANY SATISFIED CUSTOMERS.*

Strategically Partnering with iPipeline

We decided to make the digital journey to sell our diversified insurance products, but we first needed a partner whose vision for the industry was in line with our strategic needs. Throughout the RFP process, iPipeline demonstrated the critical thinking to carve out the optimal solution set to meet our needs. Pekin Life Insurance Company prides itself on going 'Beyond the expected®' in our relationships with our agents and customers. The implementation of iPipeline's quoting, illustrations, and iGO e-App solutions demonstrates our on-going commitment to technical excellence and improving the overall experience.

- Diane Steiner, Vice President, Life Underwriting | Pekin Life Insurance Company

> "iPipeline demonstrated the critical thinking to carve out the optimal solution set to meet our needs"

Leveraging the SSG Digital Platform

I am delighted that we have now come to an agreement with iPipeline to include all of our products on their innovative portal. This is the final piece of portal work for British Friendly and now means we are visible on all the major portals in the market. Adviser awareness and engagement are key to a business developing and with this new partnership, we will be reaching a new community of advisers that may not have considered British Friendly before. We are a passionate business that wants to help the intermediary market to sell Income Protection and that is why we have delivered so many new enhancements to our products.

- Iain Clark, Distribution and Marketing Director | British Friendly

Optimizing the Customer Experience

As part of Lincoln's commitment to helping individuals achieve their financial goals, we continuously look to deliver innovative products such as TermAccel – leveraging iPipeline's iGO® Drop Ticket and DocFast® – that help advisors serve the specific needs of specific markets. We also optimize the use of digital technology and underwriting best practices to simplify the selling, buying and delivery process. Through collaboration with leading providers such as iPipeline, we are able to enhance the experience for both the advisor and client, leading to favorable outcomes for all parties.

- Heather Milligan, Senior Vice President, Underwriting & New Business | Lincoln Financial Group

The AlphaTrust e-Sign integration resulted in unexpected advantages for us. We rapidly realized most of our customers wanted to e-Sign in face-to-face meetings. This accelerated our straight-through processing by eliminating signature delays and streamlining policy servicing—a win-win for us and our customers. The automatic generation of e-Sign notifications is another plus for us. It notifies us when all parties have completed their signatures and eliminates a manually executed verification process. Having AlphaTrust e-Sign integrated into our platform is a big plus for us. We have substantially improved our customer journey and anticipate extending the value of AlphaTrust e-Sign throughout our selling and servicing process.

- Charlie Allen, CTO | Southern Farm Bureau Life

> "[With iPipeline], we are able to enhance the experience for both the advisor and client"

Accelerating New Business and Underwriting

Consumers and agents have high expectations for fast, reliable services and products, and we need to stay ahead of these expectations. Resonant is a platform that will support our growth now and well into the future by enabling us to offer less invasive testing, rapid-issue, or even instant-issue policies based on predictive analysis of electronic information from internal and external sources. Combined with iGO® e-App and DocFast® for e-Delivery, we're able to offer agents solutions that help them build better relationships with their customers and with OneAmerica.

- Gregg Poston, VP, Individual Operations | OneAmerica

Scalability & Flexibility with e-Delivery

Prudential's business case for implementing DocFast revolved around speed, experience, scalability and flexibility. Today's customers view technology as a necessity and not as a convenience, and we want to meet their expectations including where, when and how they would like to take delivery of their product. So far, the delivery results show that issued-to-placement cycle times have been cut in half from 14 to 7 days, and we see an opportunity to improve more on these times. iPipeline's e-Delivery solution with two-way communications and tight security is accelerating our new business process and enabling us to expand our digital transformation strategy to enhance both the customer and producer experience.

- Dan Jennings, Vice President, Operations | Prudential

Our legacy with iPipeline spans many years of process refinement and technology integrations. During that time, we have made substantial strides in creating a digital life insurance platform to enhance the customer and agent experience. Our ability to auto-generate policies and e-Deliver them is a tremendous advantage for Erie, our agents, and our customers. We have also enabled agents to adjust face amounts within approved underwriting parameters to reissue policies with an illustration. This is reducing cycling and processing costs, making it easier for our agents to do business with us, and improving customer satisfaction.

- Louis Colaizzo, Senior Vice President of Life Insurance | Erie Family Life

> "iPipeline's solution with two-way communications and tight security is accelerating our new business process and enabling us to expand our digital transformation strategy to enhance both the customer and producer experience"

Automating Annuity Processing

While our partners have traditionally sold health insurance products, we made the strategic decision to break the mold, automate the process using SimplyAnnuity™ – powered by iPipeline's AFFIRM – and offer fixed and fixed indexed annuities to our partners. Our philosophy is simple: insurance and financial products should be easy to purchase and simple to understand. Our decision to offer these annuities is just another part of our expanding capability to provide families what they need now and in the future.

- Dave Burghard, President | BCSIA

While we have historically partnered with key financial services organizations – banks, broker-dealers, credit unions – we are now marketing to insurers to strategically expand their product offerings of life insurance and annuity products, automate the selling and buying process, and grow their revenue. BCSIA represents the future of one-stop selling and purchasing of diversified products. Given the right tools and support, there is a huge, untapped opportunity to sell these simple annuity products. SimplyAnnuity™, powered by AFFIRM, has proven to be a powerful tool to streamline our business processes.

- Jim Sorebo, CEO | Four Seasons Financial

Enabling the Field Force with an Integrated Agent Portal

Having the right technology in place supports our recruitment efforts and the success of our agents. We decided to partner with iPipeline on the launch of AgentOne to deliver a unified platform to modernize how we work. The customer journey hinges on how our mobile field force works. With AgentOne, our people are always equipped with what they need and connected with the families they serve. This is helping us to improve our relationships with the carriers we represent and with our customers for life.

– John Joseph, Chief Strategy Officer | WFG

> "Our decision to partner with iPipeline aligns with our goal of enhancing the customer experience and improving internal processes through next-generation technologies that deliver operational improvements"

Direct to Consumer Digitization

Our decision to partner with iPipeline aligns with our goal of enhancing the customer experience and improving internal processes through next-generation technologies that deliver operational improvements. Our customers have always been our top priority, and that relationship begins with the application process. We are committed to providing a seamless experience for all our customers and applicants, regardless of how they choose to engage with us – be it online or directly with one of our sales representatives. Our life insurance application process must continue to evolve with the ever-changing needs of today's consumers, and we are excited about launching this modern buying experience.

– Andy Mudra, Vice President | Amica
Leveraging iPipeline's Illustrations, iGO and Resonant

Underwriting and policy delivery digitization removes barriers to purchasing with individuals put off by time-consuming and complex life insurance buying activities. Our goal is to keep it quick and simple, and when desired, allow the consumer to use live chat at our site to secure answers to questions. After evaluating multiple options, we innovated a new solution with iPipeline to achieve our vision for a totally automated process. SagicorNow® enables consumers to purchase up to $1,000,000 in term coverage or up to $250,000 of whole life coverage through a virtual experience. Our focus is to increase the velocity of new business sales by leveraging best-of-breed technology, such as that provided by iPipeline. Together, we have managed to launch a solution that provides our family, friends, and neighbors with a premier purchasing experience along with outstanding support.

– Mike Stricker, CAO | Sagicor
Leveraging DocFast and Resonant NB&UW

Providing BGAs with a Digital Toolset

Digital transformation is a critical component of the continued success of our industry. AIMCOR has long been an advocate of change and this is reflected in our efforts to transform our business by forging national relationships with key technology providers like iPipeline. Their e-ssentials BGA toolset will enable our members to deliver a seamless, multi-carrier and multi-product straight-through-processing (STP) package to their current and future producers. With the youngest agency roster in the industry and millennials emerging as our largest collective selling opportunity, we are viewing this partnership as an opportunity to blaze a new trail and have a positive impact on our industry's performance as whole.

– John Ziambras, President and CEO | AIMCOR Group

Benchmarking Performance Against the Industry

Being informed and knowledgeable are two key components of the business paradigm at Premier Brokerage. The only way to ensure growth and organization performance is to get your arms around the data points. We have been a user of iPipeline's iGO® e-App, Agency Integrator® AMS and other distributor solutions for years, but the ability to drill into the day-to-day operational data and then compare our performance to the industry is an enormous value-added capability. Performance accountability for case managers, CRM owners, and agents is critical to the success of any brokerage firm. My team and I look forward to accelerating our growth through the implementation of InsureSight Analytics.

- Steve Katz, CEO | Premier Brokerage

Instant Access to Multiple Illustrations Scenarios

AdvisorNet was looking for a tool to make running illustrations more efficient for both our advisors as well as our internal and external wholesalers. We often create spreadsheets and run countless illustrations which takes an enormous amount of time. With iSolve, our staff will save time and our advisors will have the ability to make changes and run different scenarios without requiring assistance. This will cut down on the back and forth for the rerunning of illustrations and creating of manual spreadsheets. We are viewing this as a win-win for everyone.

- Aaron Niedorf, VP of Insurance Operations | AdvisorNet

We are excited to invest in a software that is going to streamline many of our internal processes. We have been looking for some time for a product just like iSolve. As an early adopter of the solution, we look forward to providing real-time feedback to influence the next round of updates for the product.

- Ryan Witte, Senior Vice President of Sales | Brokers International

> "We view iPipeline as a solutions provider driving innovation within the life insurance industry"

As a life insurance brokerage, we take great pride in providing our brokers with the ultimate products and tools needed to simplify the complexities of the life insurance market. iSolve is an innovative and powerful tool, which will save our brokers a lot of time and enable them to close more cases rapidly and efficiently. We view iPipeline as a solutions provider driving innovation within the life insurance industry, and we are excited to jump-start this new product deployment with our agents

- David Braver, Principal | EIB Inc.

As a leading IMO providing our 15,000 agents nationwide with the latest in technological innovations, we are always searching for the next 'game changer' to help our agents streamline their business, save time, and gain a speed-to-market advantage. iSolve makes the task of researching and quoting multiple carrier perm products a simple, accurate and extremely quick process. This is potentially a real game changer for us and we are expecting immediate adoption across our agent base.

- Bill Levinson, Managing Partner | Levinson & Associates

Best of Breed Illustrations Functionality

Our decision to purchase iPipeline Illustrations was reached after evaluating the dominant offerings in the marketplace today. SaaS-based software, modern functionality, speed, scalability, and the option to integrate Needs Analysis and Advanced Sales in the future were on the top of our list. iPipeline's track record, guidance throughout the evaluation process, and our access to their network of 1,300 distributors for product sales convinced us to bring in their proven technology.

- Richard Leach, Senior Vice President | ELCO Mutual

> " [iPipeline] is an incredible solution provider in our industry and we're excited to integrate directly with them "

Digitizing Medicare Supplement Sales

Speed and accuracy are critical during the open enrollment period for Medicare Supplement. The ability of our agents to rapidly respond to customer queries is important to every individual involved in the buying and selling process. Using iPipeline's integrated solution will deliver new efficiencies, improve customer service, and help us to attract new agents. Pekin Insurance is committed to superior service for our customers. iPipeline's broadly used quoting, illustrations, and e-application will serve as key components in our digital transformation strategy, and Medicare Supplement is just the beginning.

- Joel Jackson, Vice President, Marketing | Pekin Insurance
Leveraging iPipelines quoting, Illustrations, and iGO® solutions

Accelerating the Advisor Workflow

Opening accounts takes time, and every minute we shave off that process for the advisor adds up. iPipeline has provided us with an automated solution that helps to reduce errors by taking the data from an advisor's CRM to open new accounts. By substantially reducing Not in Good Order (NiGO) submissions and speeding up the process, advisors can focus more on clients and less on administrative tasks. We expect registered investment advisors will benefit from greater efficiency and accuracy

- Bob Mahoney, Director, Technology Solutions | TD Ameritrade

Laser App Software is a leader within the industry and has a broad outreach to ¬financial advisors. By integrating with Laser App, we are making it easier for advisors using leading CRM solutions, such as Junxure, to deliver better solutions to their clients.

- Gary Zimmerman, Founder & CEO | MaxMyInterest

The main objective of Oranj is to help the advisor break through common barriers so they can fully connect with clients and prospects, and all the technology we incorporate into our platform, including Laser App Anywhere, is in keeping with this goal.

- David Lyon, Founder & CEO | Oranj

Laser App is an incredible solution provider in our industry and we're excited to integrate directly with them. When it comes to equipping advisors with more efficient workflows, LaserApp is the industry leader and we're thrilled to partner with them.

- Aaron Klein, CEO | Riskalyze