

NIC Agent App Feature Overview

February 2023

The **NIC Agent App** provides BGAs with a **FREE** service that enables their Agents with access to their in force book and drives deeper digital engagement between BGAs and their Agents.

This document describes various features available within NIC Agent Application (version 2.1.6, February 2023)

NIC user the terms Advisor and Agent synonymously.

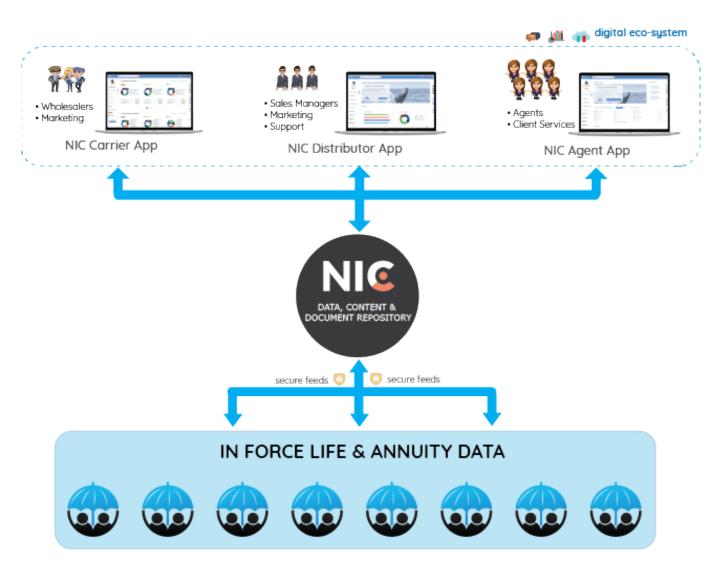


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NIC OVERVIEW



3 connected applications that enable access to in force data & services:

- Agent App for Agents and Support Staff
- Distributor App for BGAs, Sub-BGAs, GAs, Broker Dealers, Banks and Wirehouses Sales & Support Teams
- Carrier App for Carrier Sales & Marketing Teams



AGENT APP

A single, multi-Carrier, multi-Distributor app to for your Agents to manage, service and drive additional premium from their in force book

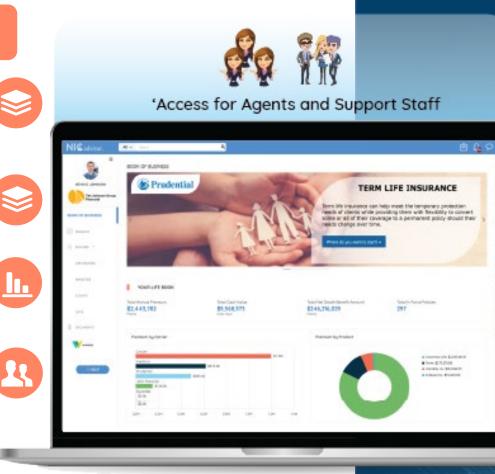
ACTIVATE PROGRAM

In force data from multiple Carriers (participating Carriers)

In force policies written through multiple BGA partners (participating BGAs)

Data Insights including; lapse pending policies, term renewals & term conversion opportunities

Policy Owner Profiles, In Force Data & Documents



Data analytics tools to filter, sort and segment in force data



Policy event management & notifications



Carrier & Distributor Profiles including links to services, apps & tools

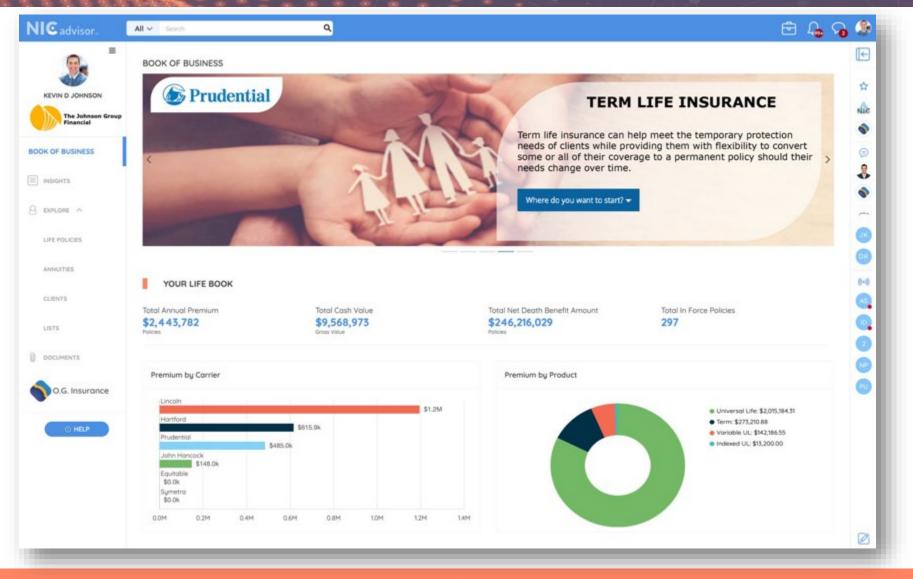


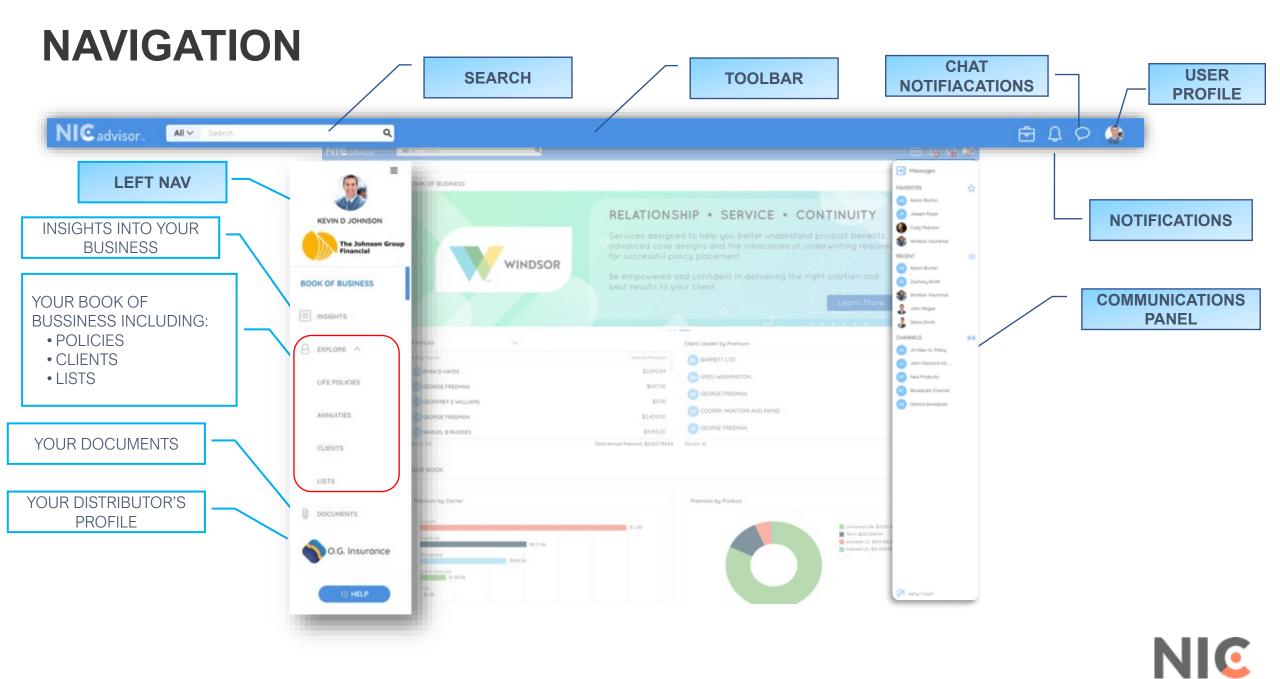
Access for service and support teams

Additional features are available through the Agent Subscriptions: i) Data Extracts, ii) Annuity Data, and iii) Policy Watch (policy monitoring)

NIC Agent App

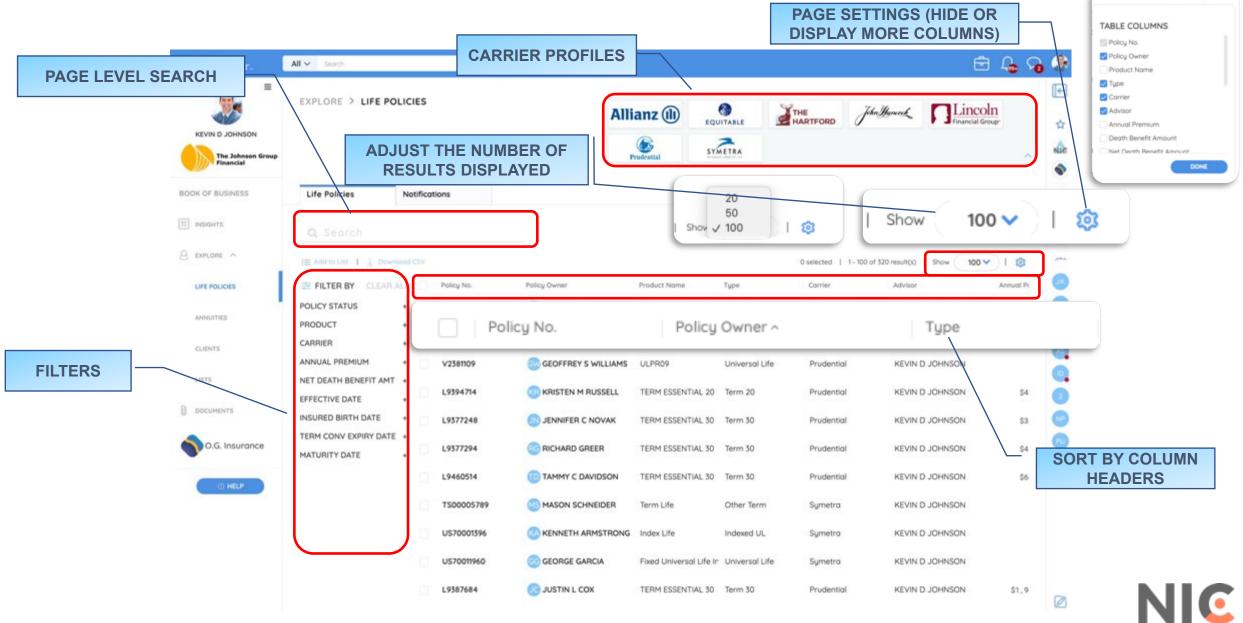
AGENT APP HOME PAGE











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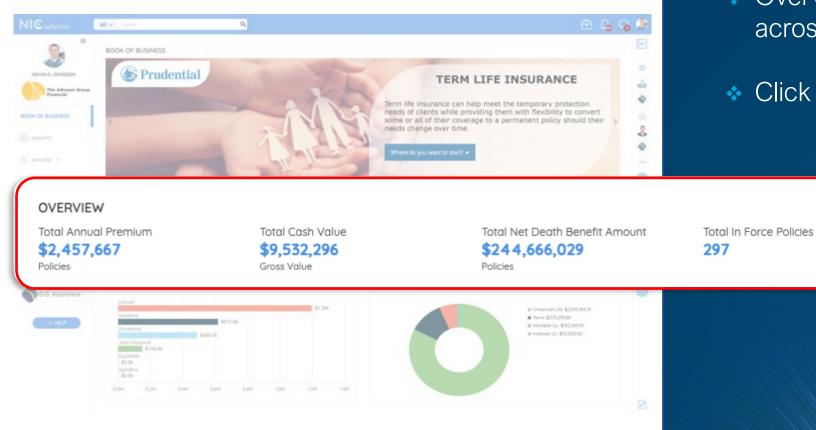
ACTIVATE & ENGAGE PROGRAM FEATURES

The Activate & Engage Programs provide Agents with access to in force data across multiple Carriers and multiple BGAs

The Activate & Engage Programs are **FREE** for Agents!

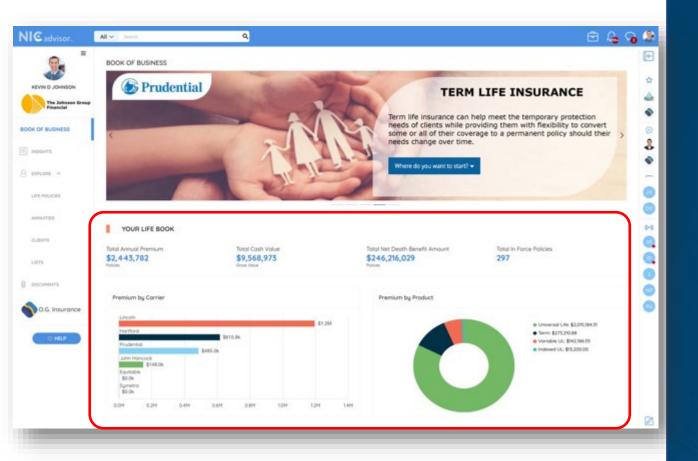


HOME PAGE BOOK OF BUSINESS OVERVIEW



- Overview of the entire book of business across multiple Carriers
- Click on the values to view details

HOME PAGE BOOK OF BUSINESS OVERVIEW



- Your book of business across multiple Carriers
- Business Overview shows more information about your business e.g. List of policies ranked by premium
- Client Leaderboards show Top Policy Owners by Premium or by Product
- Clicking on column headers allows you to sort the data

Exploring & Segmenting Your In Force Book

Data Analytics Simplified

Tools for Agents to filter and segment their in force book using multiple attributes:

- Policy Statuses
- ✓ Carrier
- Product
- Premium
- ✓ Key Policy Date



Page 12

LIFE POLICIES

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DOCUMENTS	INSURED BIRTH DATE	+	L9377248	JENNIFER C NOVAK	TERM ESSENTIAL 30	Term 30	Prudential	KEVIN D JOHNSON	\$3
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			L9267332	MARY BROWN	TERM ESSENTIAL 30	Term 30	Prudential	KEVIN D JOHNSON	\$4
			L9267738	RYAN YOUNG	TERM ESSENTIAL 30	Term 30	Prudential	KEVIN D JOHNSON	\$5

- Access to in force policies across multiple Carriers
- Filter the policies by Carrier, product, policy status, annual premium, etc.
- Sort columns by clicking on column headers
- Add and hide columns using the 'gear' icon
- Click on a policy to view details
- Create lists

CLIENTS

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KEVIN D JOHNSON	Clients									
The Johnson Group Financial	Q Search									
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ANNUITIES		CHELSEA SIMMONS	Florida			Female	36	1	KEVIN D .	
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		BRYAN M SCOTT	Florida			Male	49	1	KEVIN D 、	
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DOCUMENTS		KIM DAVIS	Florida			Female	46	1	KEVIN D 、	
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		ANTHONY SMITH	Florida			Male	61	1	KEVIN D .	
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		ROBERT MARSHALL	Florida			Male	66	1	KEVIN D .	
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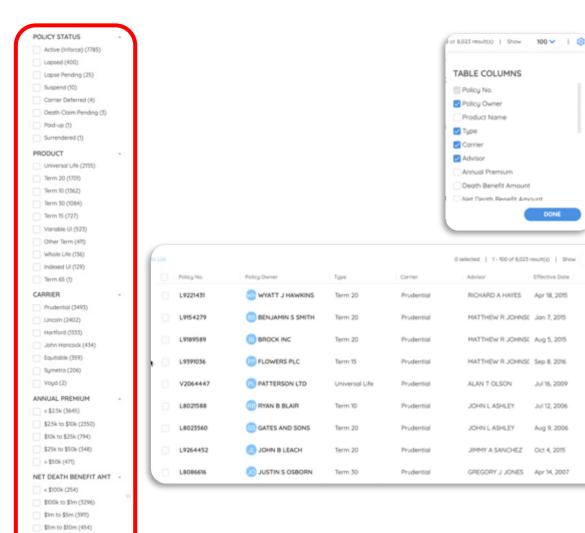
- Access to Policy Owners across multiple Carriers
- Filter the Policy Owners by their policy's annual premium, net death benefit amount, etc.
- Click on a Policy Owner name to view details
- ✤ Add and hide columns using the 'gear' icon
- Create lists



FILTERED VIEWS

> \$10m (315)

EFFECTIVE DATE INSURED BIRTH DATE



 Apply various filters to searches to refine the results sets

- Columns can be sorted by clicking on the column header
- Columns can be hidden by clicking on the gear icon

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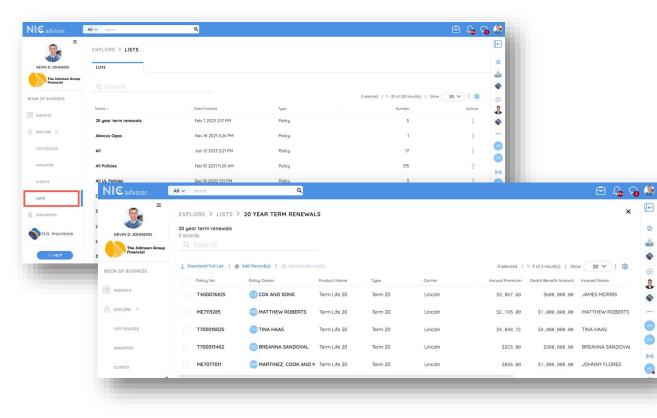
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LISTS



Create lists from search results

 Maintain and manage lists, download list and share lists

POLICY OWNER / ANNUITANT PROFILE

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	••• > PETER ROTH > DAVID BERTOILLI > ANNE-MARIE MURPHY			
D JOHNSON The Johnson Group Inancial USINESS	POLICY OWNER Anne-Marie Murphy email anne.marie.murphy@mail.com Phone Image: Second S	CHAT	☆	
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Policy Owner/Annuitant profile includes:

- Policy Owner/Annuitant demographic information (this information is received in Carrier data feeds)
- In force policy/contract overview and details
- Documents attached to the Policy Owner/Annuitant

POLICY DETAILS

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Policy details including:

- ✤ Insured information
- ✤ Beneficiary information
- Payment information
- Cash Value
- Riders



Data Insights & Sales Opportunities

Access to data-driven insights, statistics as well as sales and client engagement opportunities:

Data Insights & Sales Opportunities



- Policy Statuses
- Renewals
- Sales Opportunities
- Conversion Opportunities
- Maturity Opportunities



INSIGHTS

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- Data is organized into usable segments, some insights include derived values generated by applying analytics to the in force data
- Clicking on an 'insight' produces a list of contacts or policies
- Lists can be saved or exported



SALES & SERVICE OPPORTUNITIES

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	Insights Opportunities									Te and the second secon
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	Term Policies (Over 10 years old)			50	John Hancock -				(i)	6
	Torm 1 Balicias (Banawing in the part	7 months)		0					U	2

- Filter in force policy data to identify sales
 & service opportunities
- Save identified sales & service opportunities as a list
- Extract the data into a .csv format



CONVERSION OPPORTUNITIES

	All - Skorch			🖻 🗛 (6
3	LIFE INSIGHTS BOOK			ALL CARRIERS V	
KEVIN D JOHNSON The Johnson Group Freencial	Total Annual Premium \$2,443,782 Polosi	Total Cash Value \$9,568,973 Graw Value	Total Net Death Benefit Amount \$246,216,029	Total in Force Policies 297	
	POLICY VALUES		POLICY STATUS		
orrs		\$9,5	168,972.63 In Force	297	
LORE			216,029.31 Lopse Pending	5	
			08,362.90 Groce Period	0	
	Total Annual Premium	\$2,4	43,761.74 Lapsed Suspend	15	
				0	
				0	
				٥	
			TERM		
	NEW IN FORCE New In Force Policies (Last 30 days)		0 Term 10		
O.G. Insurance			0 Term 15		
			0 Term 20	37	
O HELP			297 Term 30	44	
				0	
			Total Term Policies	101	
	UNIVERSAL LIFE				
	Totol UL		RENEWAL OPPORTUNITIES		
		\$2,0	CONVERSION	OPPORTUNITIES	
			CONVERSION	OFFORTUNITIES	,
		\$1	42		
		5	13		
			John Hancoc	k .	
			John Huncoci	~ -	
			Term 20		
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	SALES AND SERVICE OPPORTUNITIES		Prudential	-	
		ALL CARRIERS			
		Indexed UL	Terres 10		
			Term 10		
			a la companya da companya d		
	CREATE LIST				
	MATURITY OPPORTUNITIES				
			6		
			10		
			12		
			15		
			14		

- Conversion opportunities based on Carrier specific conversion criteria
- Click on the number to view identified conversion opportunities
- Save identified conversion opportunities as a list
- Extract the data into a .csv format (see Additional Programs for more information)



RENEWAL OPPORTUNITIES

E advisor.	All V Sort	٩		
KEVIN D JOHNSON The Johnson Group	Total Annual Premium \$2,443,782	Total Cash Value To \$9,568,973 \$3 Gravited	RENEWAL OPPORTUNITIES	
	POLICY VALUES Total Cash Value	\$9,560,972.63	Term Policies (Over 10 years old)	1,049
		\$246,216,029.31 \$908,362.90	Term 1 Policies (Renewing in the next 3 months)	0
	Total Annual Premium	\$2,443,701.74	Term 1 Policies (Renewing in the next 6 months)	0
			Term 5 Policies (Renewing in the next 3 months)	0
	NEW IN FORCE New In Force Policies (Last 30 days) New In Force Policies (Last 90 days)	0	Term 5 Policies (Renewing in the next 6 months)	0
() HELP		0 297	Term 10 Policies (Renewing in the next 3 months)	20
			Term 10 Policies (Renewing in the next 6 months)	48
	UNIVERSAL UFE		Term 15 Policies (Renewing in the next 3 months)	9
		155 \$2,015,184.31 57	Term 15 Policies (Renewing in the next 6 months)	21
		\$142,166.55 4 \$13,200.00	Term 20 Policies (Renewing in the next 3 months)	8
			Term 20 Policies (Renewing in the next 6 months)	8
			Term 25 Policies (Renewing in the next 3 months)	0
			Term 25 Policies (Renewing in the next 6 months)	0
			Term 30 Policies (Renewing in the next 3 months)	8
			Term 30 Policies (Renewing in the next 6 months)	8
			Term 35 Policies (Renewing in the next 3 months)	0
	SALES AND SERVICE OPPORTUNITIES	ALL CARRIERS	Term 35 Policies (Renewing in the next 6 months)	0
		From D To D	Term 40 Policies (Renewing in the next 3 months)	0
		From B to B	Term 40 Policies (Renewing in the next 6 months)	0
		From D To D	Other Term Policies (Renewing in the next 3 months)	0
	CREATE LIST	-	Other Term Policies (Renewing in the next 6 months)	0
	MATURITY OPPORTUNITIES Policies motiviting in the next 30 days	6	All Policies over 20 years old	728

- Renewal opportunities based on Carrier data
- Click on the number to view identified renewing opportunities
- Save identified renewing opportunities as a list
- Extract the data into a .csv format (see Additional Programs for more information)

MATURITY OPPORTUNITIES

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2	LIFE INSIGHTS BOOK			ALL CARRIERS		
JOHNSON Ne Johnson Group nenclal	Total Annual Premium \$2,443,782 Polea	Total Cash Value \$9,568,973 Gran Value	Total Net Death Benefit Amount \$246,216,029 Patters	Total In Force Policies 297		4
						•
. 1	Total Cash Value	\$9,540,972.63	POLICY STATUS		297	3
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		\$908,362.90			0	
	Total Annual Premium	\$2,443,701.74			15	
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OHR		0			37	
U NO		297			4.4	
					0	
					6	
			Total Term Policies		101	
	UNIVERSAL LIFE		RENEWAL OPPORTUNITIES			
		155			49	
		\$2,015,184.31			0	
		57			0	
		\$142,106.55			0	
		4			0	
		\$13,200.00				
	(MATURITY OPP	ORTUNITIES	5		
		Policies mat	uring in the	next 30 days		
		Policies mat	uring in the	next 60 days		
		Policies mat	uring in the	next 90 days		
	SALES AND SERVICE OPPORTUN Vendor Product	Policies mat	uring in the	next 120 day:	5	
	Effective Date	Policies mat	uring in the	next 180 day:	5	
	Maturity Date	Policies mat	uring in the	next 360 day	S	
	CREATE LIST					

- Maturity opportunities based on Carrier data
- Click on the number to view identified maturity opportunities
- Save identified maturity opportunities as a list
- Extract the data into a .csv format (see Additional Programs for more information)



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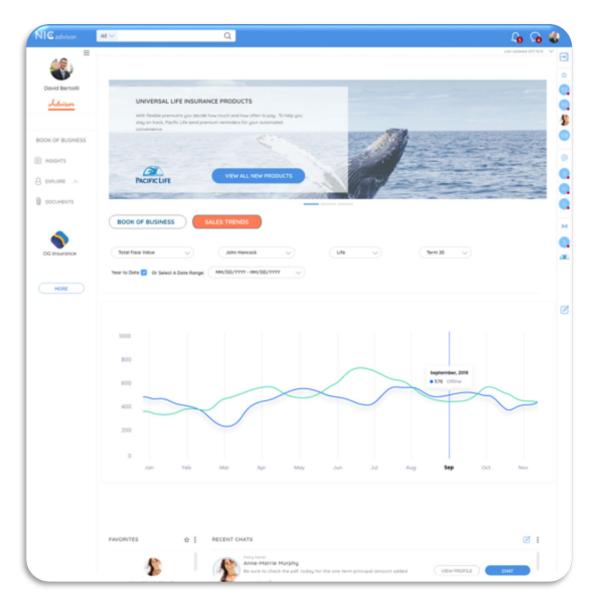
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16

SALES TRENDS



- Near real-time reporting on all sales and production statistics.
- Access to sales statistics for your in force book:
 - ✓ Total premium
 - ✓ Total face amounts
 - ✓ Total number of in force policies
 - And more...
- Configurable reporting:
 - Select your own date ranges
 - By Carrier
 - By Product
- Available for every book of business in your hierarchy

Notifications



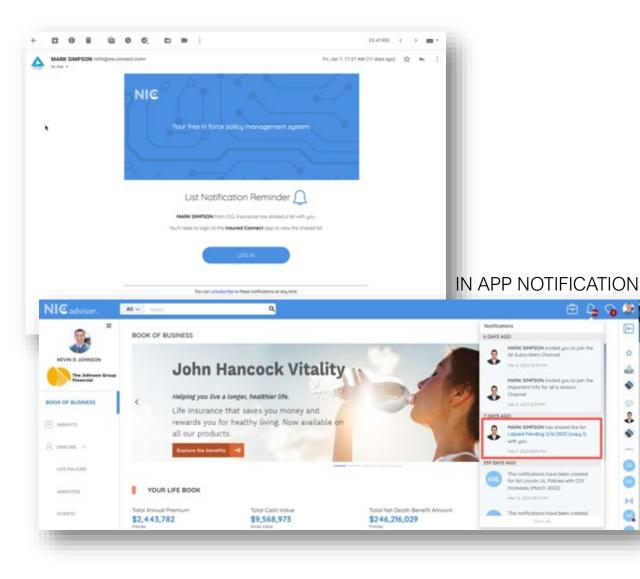
Notifications & Alerts

Email and in-app notifications to alert Agents and their support teams regarding important policy events:

- Sales Opportunity Notifications
- Client Engagement Notifications
- Policy Change Notifications
- Policy Event Notifications
- Communication Notifications



NOTIFICATIONS



- Each Agent on the list gets an email notification as well as in app notification
- Email notification lets the Agent know that there is a list waiting for them and they need to log into the NIC Agent App to view
- Clicking on the in-app notification takes the Agent directly to the list of policies you have shared with them



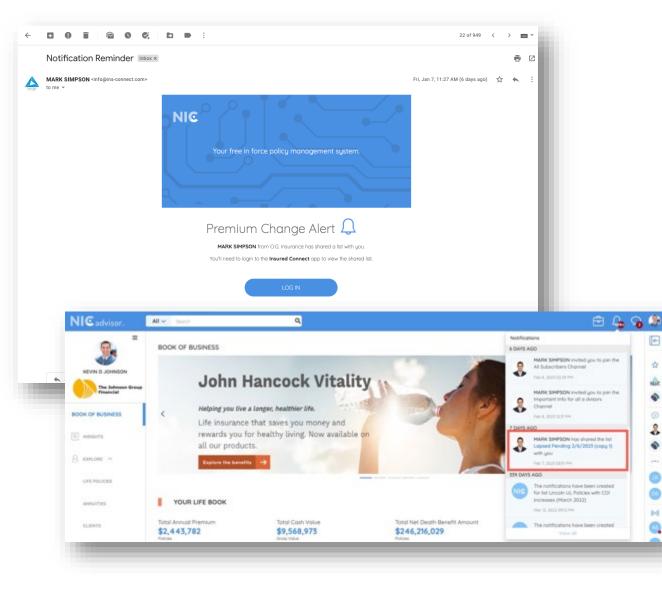
SALES OPPORTUNITY NOTIFICATIONS

MARK EMPSON -integre	NIC	e policy monogement system	.ae 2.1127 AH (11 dep age) 🛣 🔸]		
	MARK SIMPSON IN	ication Reminder Construction for shared a list with you to Insured Connect app to view the shared list LOG IN			
	You can unua	succise to these nonflications of any time.		N APP NOTIFICAT	
NIC advisor.	Al - Such	active to these half-colours of any time.		E 🔶	IC P
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NEVEN D JOHNSON The Johnson Gray BOOK OF BUSINESS	All V BOOK OF BUSINESS John H Allping you five Life insurance rewards you f all our produc	A Hancock Vitali a longer, healthler life. e that saves you money and for healthy living. Now available cts.	ty	Nutriconsors 6 JORS ACCO 6 JORS ACCO Mark SameSon Anviet give to pain the Al Social State Control Mark SameSon Anviet give to pain the Al Social State Control Mark SameSon Anviet give to pain the Al Social State Control Mark SameSon Anviet give to pain the Al Social State Control Mark SameSon Anviet give to pain the Al Social State Control Mark SameSon Anviet give to pain the Social State Control Mark SameSon Anviet give to pain the Lasses Francing 204/2003 (copp 1) unit you	

- ✤ Ability to create: Custom reminders on policies
 - General reminders about broader services that apply to a policy



POLICY WATCH NOTIFICATIONS



✤ Ability to create:

Custom reminders on policies

General reminders about broader services that apply to a policy

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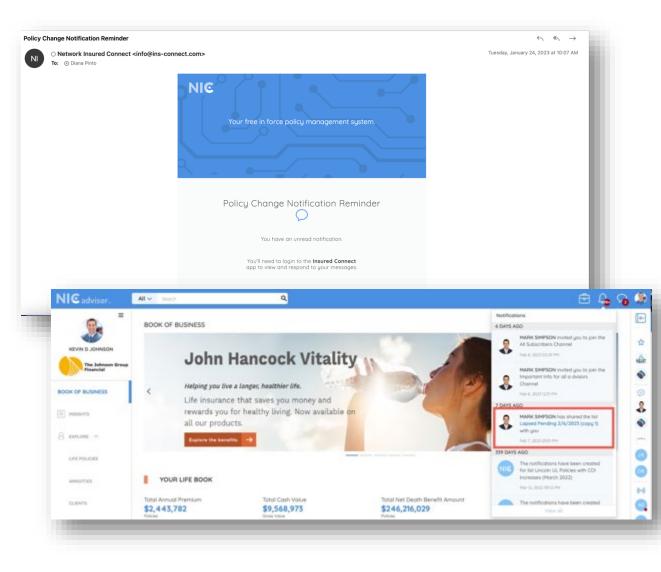
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POLICY EVENT NOTIFICATIONS

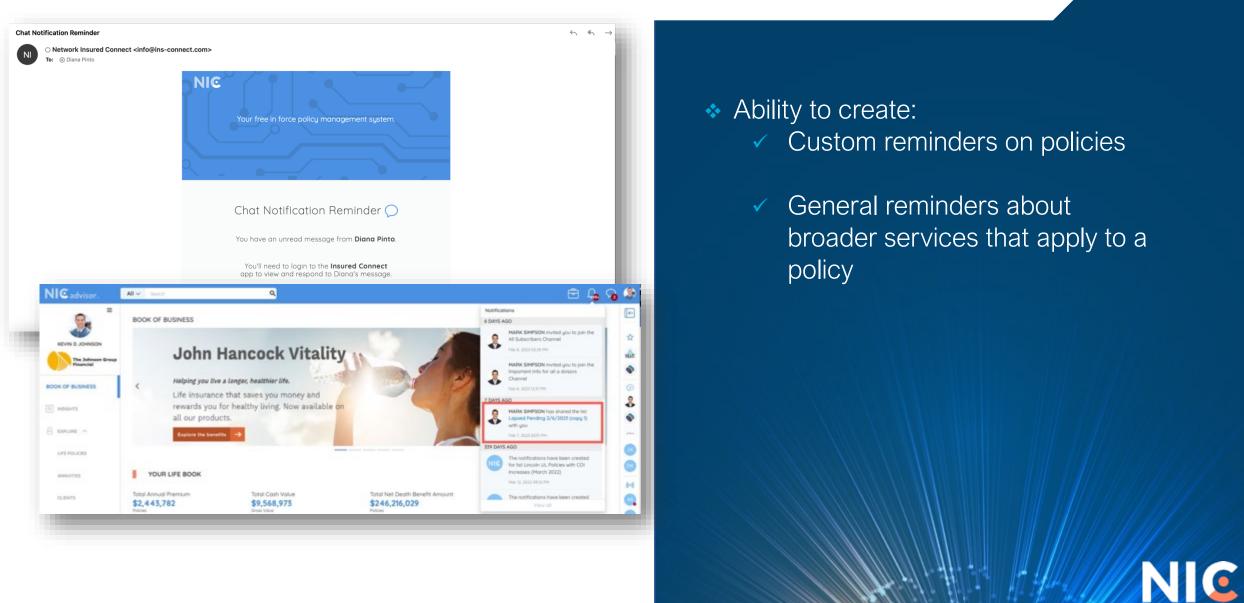


Ability to create:
 Custom reminders on policies

 General reminders about broader services that apply to a policy



COMMUNICATION NOTIFICATIONS



BGA – Agent Engagement



BGA – Agent Engagement

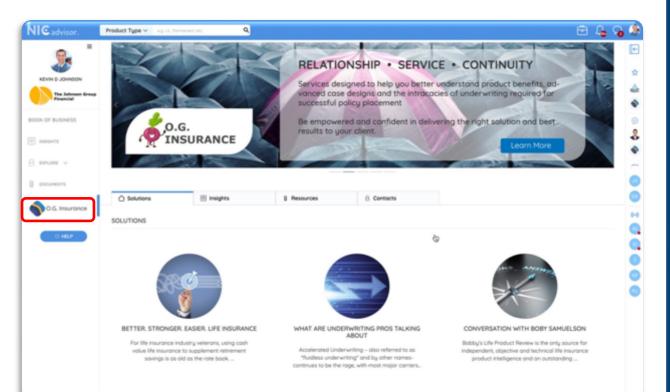
Agents and their support staff have access to the BGAs profile and sales teams on NIC.

The BGA profile includes BGA advertising, marketing content, access to resources and links as well as access to the BGAs Sales Teams

Note: NIC is **FREE** for your Agents



AGENT MARKETING

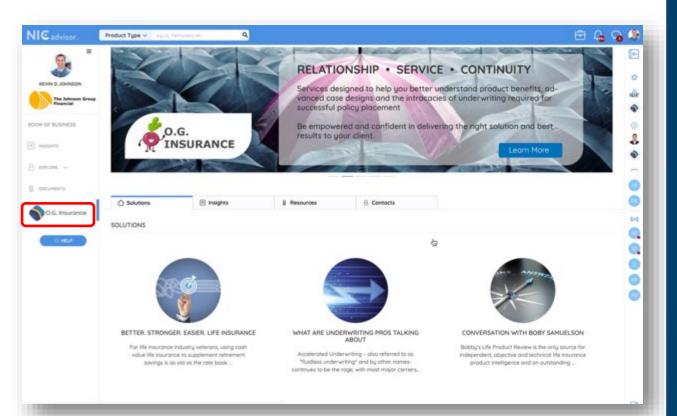


Upload and advertise your:

- Marketing & promotional content
- Product information & links
- Agent support contacts
- Links to your websites
- All user activity and 'clicks' are recorded to provide feedback to advertisers

NC

BGA PROFILE



- Provides users with access to their Distributor information:
 - Marketing & promotional content
 - Product information & links
 - Distributor Sales Mangers assigned to the Agents
 - Agent support contacts
 - Links to Distributor websites

Note: content is provided by the Distributor

BGA SALES MANAGERS

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	NSURANCE						
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SALE	S MANAGER						
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	B johnny eiji windsorcom						
	5 1900 293-2123						
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Access to Distributor Sales Managers

 Ability to communicate with Sales Managers through NIC

Note: Sale Managers are set by Distributors



BGA RESOURCES

NIC distributor.	O., Product Type - ep.0., for	ana da			🖻 🔓 🖓	۲
				O.G. Insurance Agent Survey Rate your O.G. experience Participate Now		
A course of		🗐 insights) Resources	e Contacts		•
About	Resources	8 Contacts				
RESOURCES LIBRAR	Y					Ð
Life Insurance 🧷				Annuities 🖉		
For Individuals (login rea For Financial Profession For Beneficiaries				For Investorsopens in a new window For Financial Professionals (login required)		
Retirement 🧷			0	iroup Disability & Life Insurance 🖉		
Tax Forms for Participan	ts		F	or Employers or Employees or Producers		

 Provide Agents with links to websites, apps, tools, services documents, forms, illustrations, etc.



Carrier Profiles

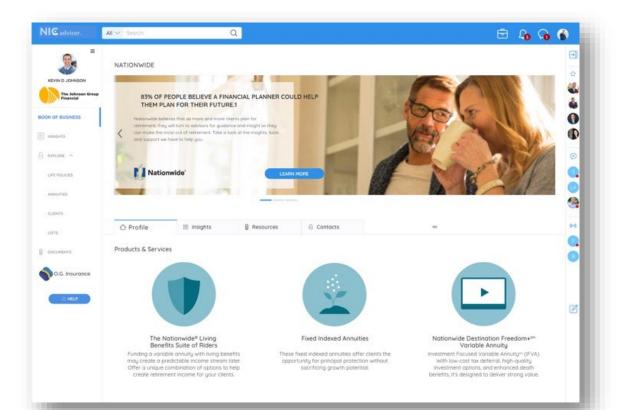
Access to Carrier Partner Profiles

Carriers create online profiles and make it easy for Agents and their support teams to access important Carrier content, digital resources, tools, apps and services.



Page 37

CARRIER PROFILE

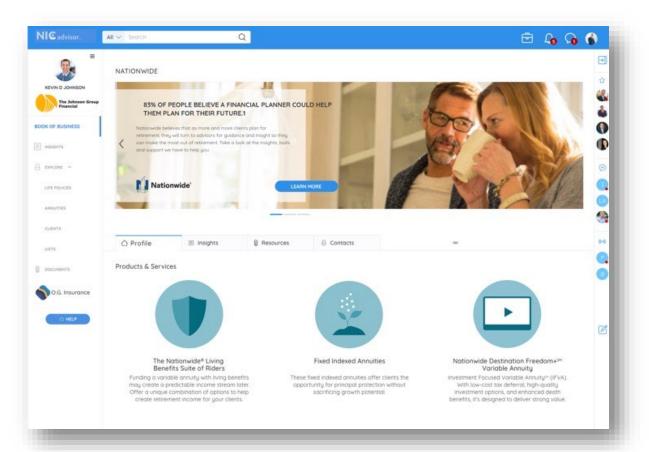


Access to Carrier information:

- Marketing content
- Documents
- Featured products & services
- Carrier support services

Note: content is provided by the Carrier or uploaded by the Carrier Super User

CARRIER SOLUTIONS

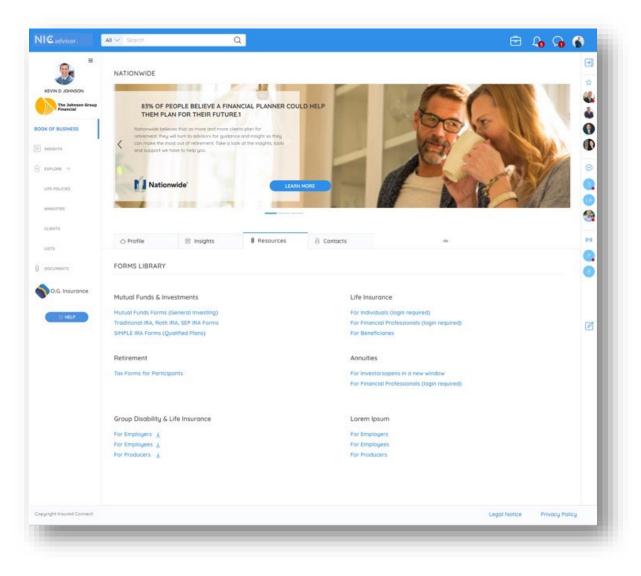


Access to Carrier products and services

Note: content is provided by the Carrier or uploaded by the Carrier Super User



CARRIER RESOURCES

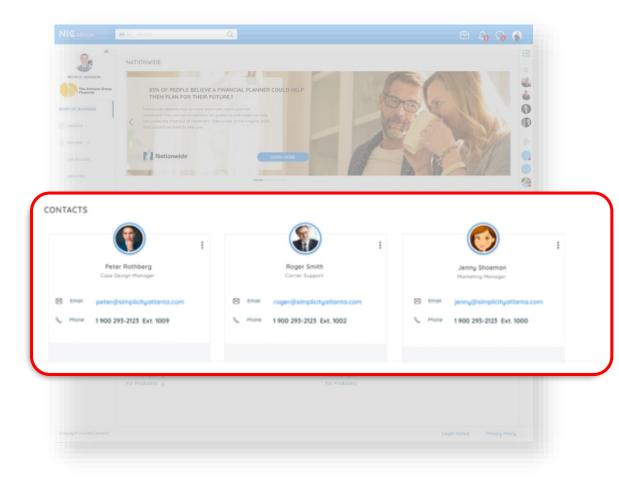


Access to Carrier documents, forms, apps, etc.

Note: content is provided by the Carrier or uploaded by the Carrier Super User

NIC

CARRIER CONTACTS



Access to Carrier contacts and departments

Note: content is provided by the Carrier or uploaded by the Carrier Super User

NIC

Searching your Book of Business



Information at Your Fingertips

NIC enables Agents and their support teams with instant access to vital information:

- In Force Policies
- Policy Owners
- Insured Parties
- Products

 \checkmark



GLOBAL SEARCH

IC advisor.	All Y Linch	٩					Ē	a 🔓 🤉	
	SEARCH > SEARCH RES	ULTS FOR **							ŀ
KEVIN D JOHNSON	Search results for :	**:589 item(s)							1
The Johnson Grou Financial	Life Policies (120)	Clients (264)	Annuities (5)						
K OF BUSINESS									
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UR POUCES	PRODUCT + CARRIER +	L9394439	DANIEL C SWEENEY	TERM ESSENTIAL 20	Term 20	Prudential	KEVIN D JOHNSON	67	5
ANNUTIES	ANNUAL PREMIUM +	V2581109	GEOFFREY S WILLIAMS	ULPR09	Universal Life	Prudential	KEVIN D JOHNSON		
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LISTS	INSURED BIRTH DATE + TERM CONV EXPRY DATE +	L9577248	JENNIFER C NOVAK	TERM ESSENTIAL 30	Term 30	Prudential	KEVIN D JOHNSON	53	6
DOCUMENTS	MATURITY DATE +	L9577294	RICHARD GREER	TERM ESSENTIAL 30	Term 30	Prudential	KEVIN D JOHNSON	54	
		L9387684	JUSTIN L COX	TERM ESSENTIAL 30	Term 30	Prudential	KEVIN D JOHNSON	\$1,9	19
O.G. Insurance		L9460514	TAMMY C DAVIDSON	TERM ESSENTIAL 30	Term 30	Prudential	KEVIN D JOHNSON	56	1
O HELP		1.9226828	GERALD GRIFFIN	TERM ESSENTIAL 30	Term 30	Prudential	KEVIN D JOHNSON	\$3.6	
		L9249148	RYAN LOPEZ	TERM ESSENTIAL 30	Term 30	Prudential	KEVIN D JOHNSON	\$1.4	
		L9267332	MARY BROWN	TERM ESSENTIAL 30	Term 30	Prudential	KEVIN D JOHNSON	54	
		L9267738	RYAN YOUNS	TERM ESSENTIAL 30	Term 30	Prudential	KEVIN D JOHNSON	55	

 Access the information you are looking for in seconds

The 'Google' like search bar at the top of the app is a global search that allows users to search by policy/contract number, policy owner, annuitant, insured or agent

NIC

POLICY OWNER & ANNUITANT SEARCH

NIC advisor.	Clients 🛩 eg First or Lost non	ne	٩						Ē	Д,	6	۲
	All Life Policies Policy No. Product Type Insured Annuities)									← ☆
The Johnson Group Financial	Contract No. Product Type Annuitant Clients											(
INSIGHTS	Policy Opper Contract Owner			Location	E-mail	Phone	0 selected 1 - : Gender	20 of 264 result(s) Show Age Poli	20 🗸	-		\$
S EXPLORE A	ANNUAL PREMIUM	•	CHELSEA SIMMONS	Florida			Female	36	1	KEVIN D	6	-
LIFE POLICIES	STATE	•	KRISTOPHER WRIGHT	Florida			Male	31	1	KEVIN D	C2	JK
ANNUITIES			BS BRYAN M SCOTT	Florida			Male	49		KEVIN D		((**))
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			G GERALD GRIFFIN	Florida		145 144-9725	Male	52	1	KEVIN D	6	0
			DANIEL HARVEY	Florida			Male	67	1	KEVIN D	i:	NP
O.G. Insurance			ANTHONY SMITH	Florida			Male	61	1	KEVIN D	ić.	
⊙ HELP				Florida			Male	43				
	_	-	RM ROBERT MARSHALL	Florida			Male	66	1	KEVIN D		

- Search using a Policy Owner or Annuitant name
- Searches can be further refined using the page level search
- Searches can be refined using filters
- Search results can be saved as lists

PRODUCT SEARCH

NIC advisor.	Product Type 🗸 🔤 UL, Perm	anent, etc.	٩					Ē	1 4 7	
EEVIN D JOHNSON	SEARCH > SEARCH R Search results for Life Policies (320)									2
OOK OF BUSINESS										Ģ
INSIGHTS	FILTER BY CLEAR AL		Policy No.	Policy Owner	Product Name	Туре	0 selected 1 - 100 c	of 320 result(s) Show 100 N	🕐 🔯 Annual P	1
EXPLORE ^	POLICY STATUS	+	L8160260	S SMALL INC	TERM ESSENTIAL 10	Term 10	Prudential	KEVIN D JOHNSON	\$5,£	1
LIFE POLICIES	PRODUCT	•	L9394439	DS DANIEL C SWEENEY	TERM ESSENTIAL 20	Term 20	Prudential	KEVIN D JOHNSON	\$7	0
ANNUITIES	ANNUAL PREMIUM	•	V2381109	GEOFFREY S WILLIAMS	ULPR09	Universal Life	Prudential	KEVIN D JOHNSON		0
CLIENTS	NET DEATH BENEFIT AMT	. 🗆	L9394714	KRISTEN M RUSSELL	TERM ESSENTIAL 20	Term 20	Prudential	KEVIN D JOHNSON	\$Z	(1)
LISTS		•	L9377248	JENNIFER C NOVAK	TERM ESSENTIAL 30	Term 30	Prudential	KEVIN D JOHNSON	\$3	0
DOCUMENTS	TERM CONV EXPIRY DATE MATURITY DATE	+	L9377294	RG RICHARD GREER	TERM ESSENTIAL 30	Term 30	Prudential	KEVIN D JOHNSON	\$4	(
			L9460514	TAMMY C DAVIDSON	TERM ESSENTIAL 30	Term 30	Prudential	KEVIN D JOHNSON	ŞE	9
0.G. Insurance			TS00005789	MASON SCHNEIDER	Term Life	Other Term	Symetra	KEVIN D JOHNSON		
⊙ HELP			US70001396	KENNETH ARMSTRONG	Index Life	Indexed UL	Symetra	KEVIN D JOHNSON		
		10	US70011960	GG GEORGE GARCIA	Fixed Universal Life In	Universal Life	Symetra	KEVIN D JOHNSON		

- Search by Product type
- Searches can be refined using filters
- Searches can be further refined using the page level search
- Search results can be saved as lists



BGA Sales Team Engagement



Deeper Agent Engagement

NIC makes it easy for your Agents to connect with your Sales Teams .



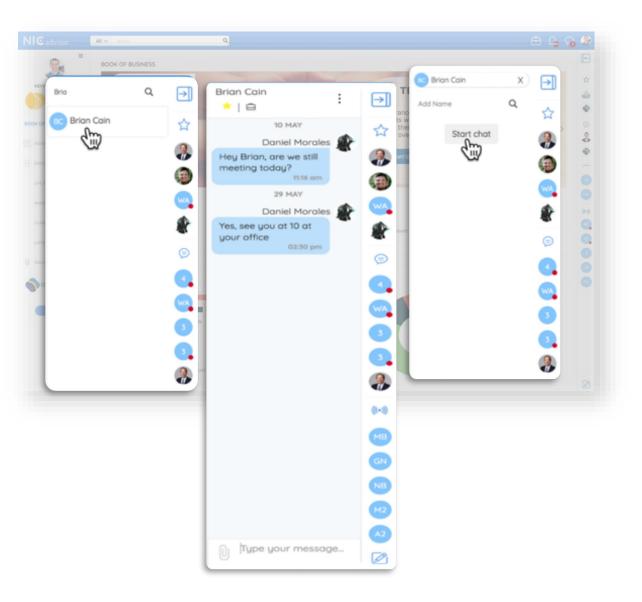
SALES & CLIENT ENGAGEMENT OPPORTUNITIES

NIC advisor.	All 🗸 Search	٩				🖻 🗛 🖓	0
	Insights Opportunities						
KEVIN D JOHNSON	LIFE INSIGHTS BOOK				ALL CARRIERS	~	
The Johnson Group Financial	Total Annual Premium \$10,247,739 Policies	Total Cash Value \$50,944,438 Gross Value		Total Net Death Benefit Amount \$792,563,543 Policies	Total In Force Policies 393		
INSIGHTS							
EXPLORE	SALES AND SERVICE OPPORTUNITIES			MATURITY OPPORTUNITIES			
LIFE POLICIES	Vendor	ALL CARRIERS	~	Policies maturing in the next 90) days	1	
	Product	Indexed UL	~	Policies maturing in the next 12	0 days	1	
ANNUITIES				Policies maturing in the next 18	0 days	2	
CLIENTS	Effective Date	From To		Policies maturing in the next 36	60 days	4	
LISTS	Term Conv Expiry Date	From 🗖 To					
DOCUMENTS	Maturity Date	From To					
○ HELP	Insured Birth Date	From To					
	CREATE LIST		J				
	RENEWAL OPPORTUNITIES			CONVERSION OPPORTUNITIES			
	Term Policies (Over 10 years old)		50	John Hancock -		0	
	Torm 1 Bolicios (Dopowing in the post	7 months)	0			()	

- Agents are able to access Sales and Client Engagement Opportunities
- Communicate those sales & service opportunities to your Agents

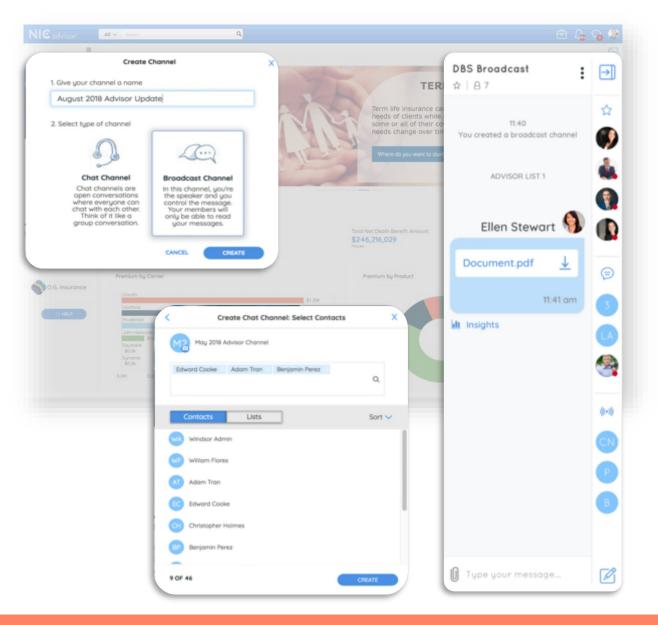
NIC

DIRECT MESSAGING



 Direct Messaging enables one-to-one conversations between you and your Agents

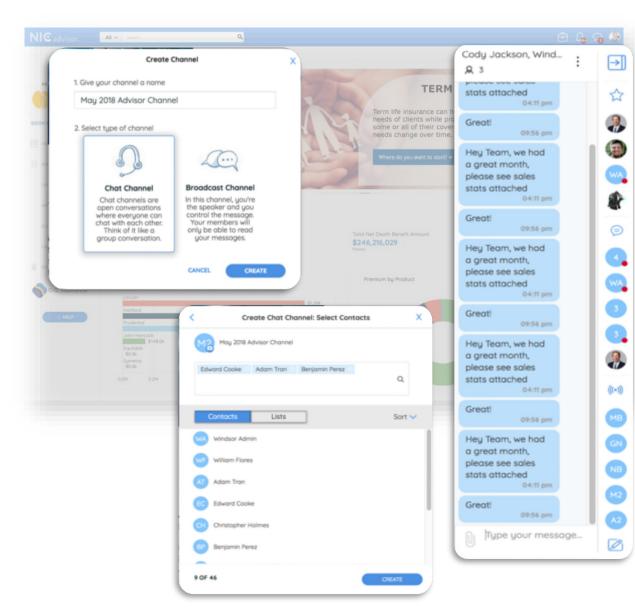
BROADCASTS



 Broadcasts enables you to send messages to multiple Agents (one-tomany)



GROUP CHAT



Group Chat supports conversations with multiple NIC users



DOCUMENT SHARING

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	DOCUMENTS							Messages	
								CARRERS	
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			16 of 16			WAS			
NIC advisor.	AB w _ ment	9,						😑 🖕 🤇	
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Upload and attach documents to:

- Policy Owners
- Business Units including offices/firms and Agents
- ✓ Lists of Agents

 E-mail and in-app notifications when a document is shared



Policy Services



Don't Miss Out on Important Client Engagement Opportunities

Whether you are monitoring in force policies for important changes (e.g., status changes) or tracking important dates like annual reviews, NIC enables you to keep tabs on your entire in force book.



POLICY WATCH

NIC advisor.	Product Type V a.g. UL, Permanent, etc.	٩		🖻 💪 🔏 🦃
=	••• CLIENTS > AARON SMITH > LIFE POLIC	CIES		
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explore ~	Life Policies	Policy Notifications are a great way to set reminders to help you better manage your policies.		_
LIFE POLICIES	Life Policies	POLICY John Hancock 82809518 🔇 AARON SMITH		EXPAND ALL
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O.G. Insurance	VIEW DETAILS	Policy Status Per Premium Paid Underwriting Class	ote	
O HELP				

- Establish thresholds on individual policies, multiple policies or your entire in force book to monitor for policy changes
- NIC alerts users when these thresholds are reached



POLICY WATCH

	EXPLORE > NOTIFICA	TIONS > POLICY WA	тсн	EQUI	TABLE THE HARTE	ORD Jehn Hand	Financial Gr	In Pradential	
The Johnson Group Financial	Life Policies	Notifications							
OF BUSINESS	Policy Events	Policy Watch					0 selected	1-10 of 10 result(s) Show 20 - 🔞	
NSIGHTS	🗮 FILTER BY CLEAR AL	Policy No.	Carrier	Policy Owner	Туре	Created Date	Notification Date	Policy Watch Event Details	
XPLORE	TYPE Annual Premium (1)	L9662490	Prudential	PEDRO RIVERA	Cash Value	Mar 15, 2022	Mar 15, 2022	changed from \$100.00 to \$150.00	
XPLOHE A	Beneficiary (1)	L9662490	Prudential	PEDRO RIVERA	Premium Paid	Mar 15, 2022	Mar 15, 2022	changed from \$100.00 to \$125.00	
IFE POLICIES	Cash Value (3) Face Amount (1)	L9662490	Prudential	PEDRO RIVERA	Underwriting Class	Mar 15, 2022	Mar 15, 2022	changed from \$100.00 to \$125.00	
NNUITIES	Loans (1) Policy Status (1)	L9662490	Prudential	PEDRO RIVERA	Policy Status	Mar 15, 2022	Mar 15, 2022	changed from \$100.00 to \$125.00	
LIENTS	Premium Paid (1) Underwriting Class (1)	L9662490	Prudential	PEDRO RIVERA	Loans	Mar 15, 2022	Mar 15, 2022	changed from \$100.00 to \$125.00	
	DATE	L9662490	Prudential	PEDRO RIVERA	Beneficiary	Mar 15, 2022	Mar 15, 2022	changed from \$100.00 to \$125.00	
ISTS	Lost 7 days	L9662490	Prudential	PEDRO RIVERA	Face Amount	Mar 15, 2022	Mar 15, 2022	changed from \$100.00 to \$125.00	
OCUMENTS	Last 30 days	L9662490	Prudential	PEDRO RIVERA	Annual Premium	Mar 15, 2022	Mar 15, 2022	changed from \$100.00 to \$125.00	
O.G. Insurance	Custom Date Range	L9662490	Prudential	PEDRO RIVERA	Cash Value	Mar 15, 2022	Mar 15, 2022	changed from \$100.00 to \$102.00	
		L9662490	Prudential	PEDRO RIVERA	Cash Value	Mar 15, 2022	Mar 15, 2022	changed from \$100.00 to \$101.00	

 Manage, segment and sort policy change notifications

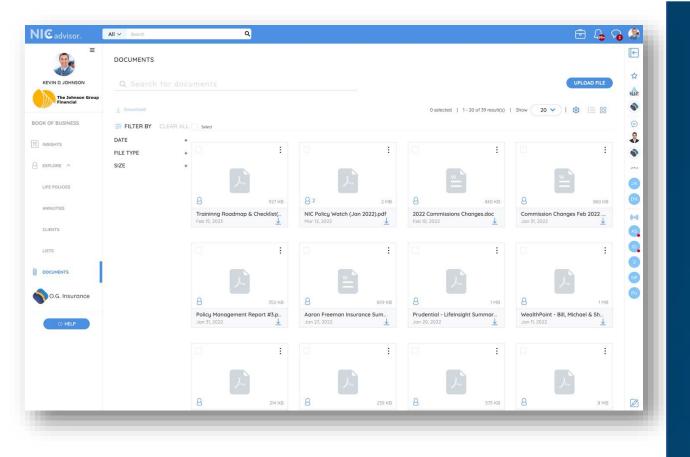


POLICY EVENTS

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	O HELP		CANCEL			

 Ability for users to set reminders regarding policy events such as a policy anniversary or client meetings.

DOCUMENTS



Attach Documents to:

- Agents, Policy Owners or Policies
- Direct messages

Share Documents:

with firms, offices and Agents



Access for Support Staff

Don't Miss Out on Important Client Engagement Opportunities

Whether you are monitoring in force policies for important changes (e.g., status changes) or tracking important dates like annual reviews, NIC enables you to keep tabs on your entire in force book.



Page 57

ADVISOR PROFILE MANAGEMENT

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 Enables advisors to make changes to their profile and manage their preferences:

- ✓ Upload profile picture
- 🗸 Logo
- Update personal & demographic
 - information
- ✓ Share admin access (on-behalf-of)
- View accounts you have access to



SHARING ACCESS TO YOUR DATA

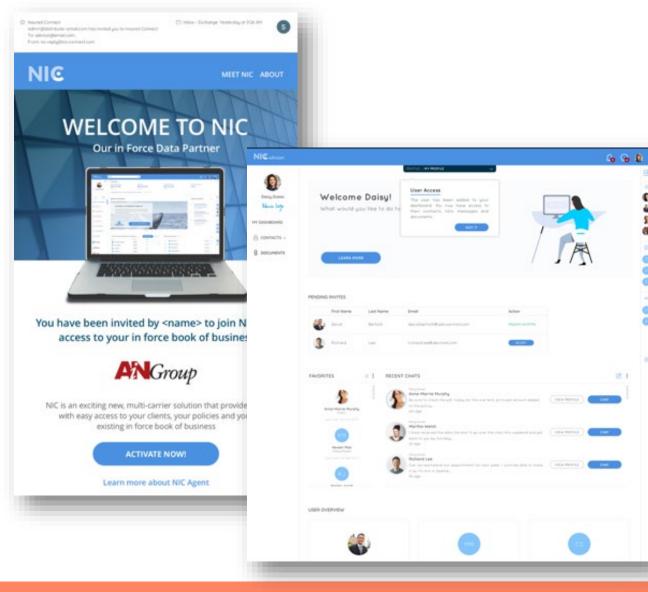
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 Advisor invites other users to help them manage their Book of Business

 Administrative user's access can be revoked and/or granted again at any time by the Advisor



ON-BOARDING YOUR ADMINISTRATIVE USER



- The Administrative user receives the invite e-mail and goes through the on-boarding steps to get access to the Advisor's Book of Business
- Administrative user's access can be revoked and/or granted again at any time by the Advisor

NC

MANAGING PRINCIPAL

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- Provides access to an entire firm's data for one or multiple Managing Principals of that firm
 - Access to firm's insights as well as individual Advisor's insights
 - Ability to communicate with other Advisors within the firm
 - Upload and share documents for anyone within the firm

NC

Additional Programs



Addition programs that are available for an additional subscription



DATA EXTRACTS

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Extract data into a .csv format

- Identified sales & service opportunities
- Life policies and annuity contracts (annual premium, beneficiary name, carrier, Advisor name, policy face amount, gross cash value, insured birth date, insured name, etc.)

Policy Owners/Annuitants
 (policy owner/annuitant name, age, advisor name, gender, policy count, face amount, etc.)

 Network (Agents, Offices, Sales Managers, etc.)

 Option to select all records or a specific number of records found on the page

ANNUITY DATA PROGRAM

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	LOCATION (STATE)		71277565	00 JORGE DELGADO	Fixed indexed Annuity	Fixed indexed Annuity	\$51,640.55	\$51,640.55	Oct 8, 2025
DIPLONE A	TYPE	•	70681551	JOE L VALDEZ	Fixed Annuity	Fixed Annuity	\$26,423.69	\$26,425.69	Oct 27, 2018
PE POUCES	CARRIER CONTRACT STATUS		707m9en	SETH R HOFFMAN	Fixed Annuity	Fixed Annuity	\$50,000.00	\$50,000.00	Feb 10, 2019
IN NOTES	ANNUAL PREMIUM			Conservation of the		na mana di kana ma			
	SURRENDER VALUE		71360843	CARON MORALES	Fixed Indexed Annuity	Fixed Indexed Annulty	\$15,006.98	\$115,006.98	Sep 13, 2026
Lishits	ACCUMULATION VALUE	•	70141999	AARON GEORGE L FREEP	Fixed indexed Annuity	Fixed Indexed Annuity	\$16,400.00	\$10,000.00	
NETWORK			71346697	AARON GEORGE L FREE!	Fixed indexed Annuity	Fixed Indexed Annuity	\$28,439.44	\$28,439.44	May 24, 2026
1575			71176479	STEPHANE HERNANDEZ	Fixed Indexed Annuity	Fixed Indexed Annulty	\$64,931.88	\$64,931.88	Aug 18, 2024
DOCUMENTS			71172480	DOMINIQUE L MOKEE	Fixed Indexed Annuity	Fixed Indexed Annulty	\$5034.28	\$51,114,28	Aug 11, 2021
0.G. Insurance			71288685	CHRISTOPHER O GONZA	Fixed indexed Annuity	Fixed Indexed Annulty	\$150,000.00	\$150,000.00	Dec 9, 2022
ou nave		٠	71248544	MITCHELL F REYES	Fixed indexed Annuity	Fixed indexed Annulty	\$31,967.12	\$51,967.12	Jun 24, 2022
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			70690857	3 SARA K TATE	Fixed Annuity	Fixed Annuity	\$184,913.78	\$100,000,00	Nov 19, 2013

 Access to view in force annuity book of business including

- ✓ data insights
- sales opportunities for all of Distributor downline

NIC



- > 25 years in the Insurtech industry
- Partnered with the majority of large IMOs & BGAs
- > Over 500,000 independent Agents/Producers
- > 40+ Life Carrier feeds (direct, daily feeds)
- SOC2 Type 2
- Industry funded

Diana Klisara

 \boxtimes

diana.klisara@ins-connect.com

416.706.4248



www.meetnic.com

