



NIC

IN FORCE POLICY MANAGEMENT &
DIGITAL ENGAGEMENT PLATFORM

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)

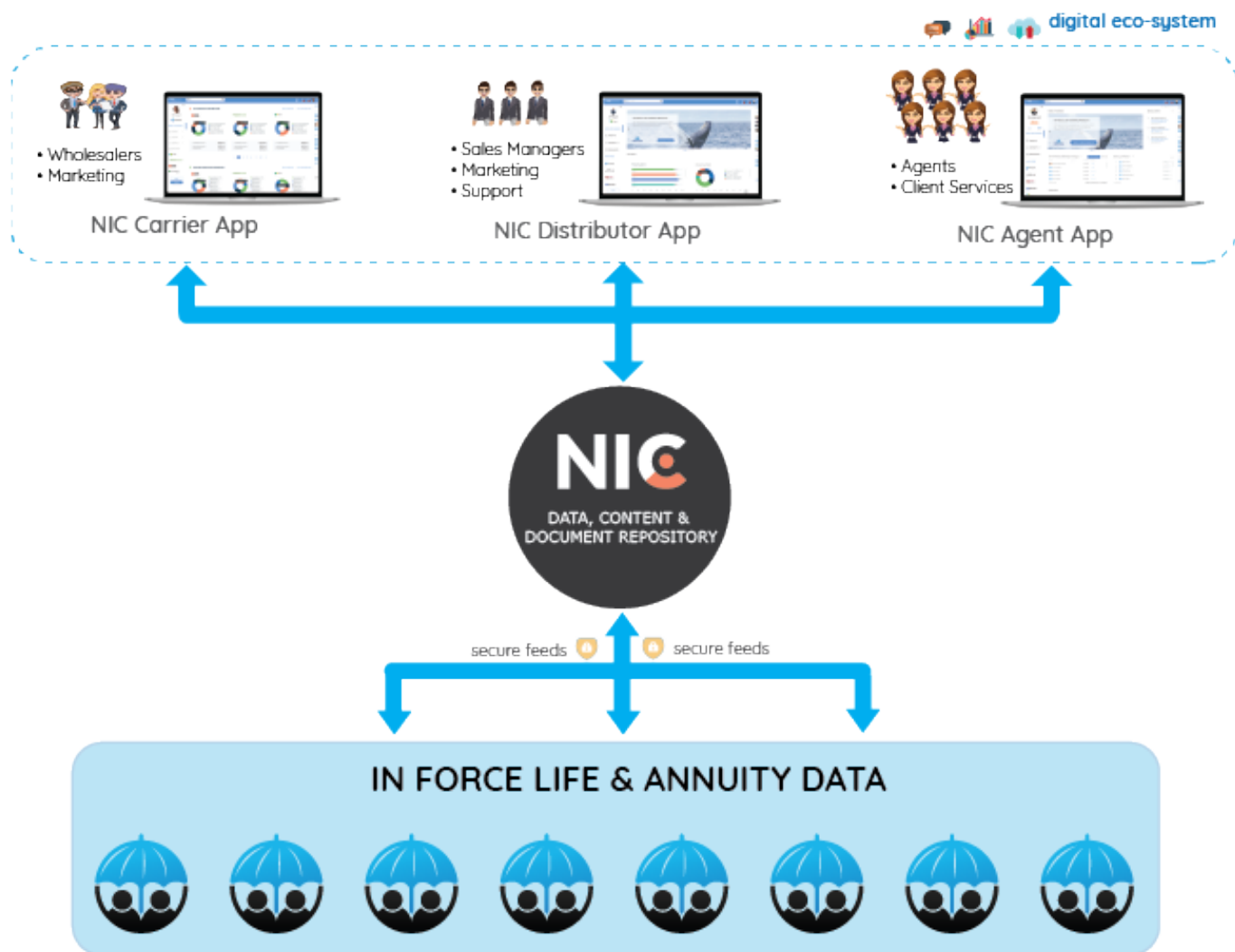
NIC user the terms Advisor and Agent synonymously.

CONTENTS

NIC Overview	4
NIC for Agents	5
Home Page.....	6
Navigation	7
Data Views Navigation	8
Activate Program Features	9
Exploring & Segmenting Your Book of Business	12
Data Insights & Sales Opportunities.....	19
Notifications.....	26
BGA –Agent Engagement	32
Carrier Profiles	37
Searching Your Book of Business	41
BGA Sales Team Engagement	46
Policy Services	52
Access for Support Staff	57
Additional Programs	62
Contact Us	65



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)



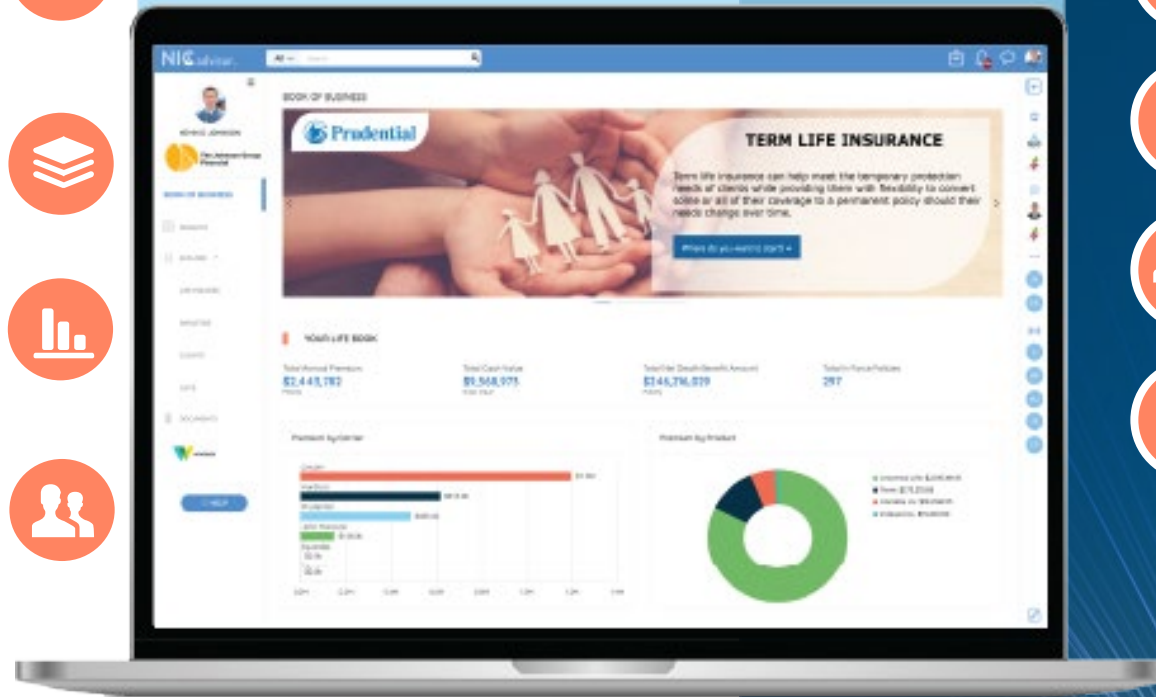
Data Insights including; lapse pending policies, term renewals & term conversion opportunities



Policy Owner Profiles, In Force Data & Documents



'Access for Agents and Support Staff



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

www.meetnic.com | info@ins-connect.com

AGENT APP HOME PAGE

BOOK OF BUSINESS

Prudential

TERM LIFE INSURANCE

Term life insurance can help meet the temporary protection needs of clients while providing them with flexibility to convert some or all of their coverage to a permanent policy should their needs change over time.

Where do you want to start? ▾

YOUR LIFE BOOK

Metric	Value
Total Annual Premium	\$2,443,782
Total Cash Value	\$9,568,973
Total Net Death Benefit Amount	\$246,216,029
Total In Force Policies	297

Premium by Carrier

Carrier	Premium
Lincoln	\$1.2M
Hartford	\$615.0k
Prudential	\$485.0k
John Hancock	\$148.0k
Equitable	\$0.0k
Symetra	\$0.0k

Premium by Product

Product	Premium
Universal Life	\$2,015,184.31
Term	\$273,210.88
Variable UL	\$142,186.55
Indexed UL	\$13,200.00

NAVIGATION

The screenshot shows the NIC Advisor interface with several navigation elements highlighted by callout boxes:

- SEARCH**: Located in the top header bar.
- TOOLBAR**: Located in the top header bar, containing icons for home, notifications, chat, and user profile.
- CHAT NOTIFIACATIONS**: Located in the top header bar, pointing to the chat icon.
- USER PROFILE**: Located in the top header bar, pointing to the user profile icon.
- LEFT NAV**: Located on the left side of the interface, containing a menu with options like 'EXPLORE', 'LIFE POLICIES', 'ANNUITIES', 'CLIENTS', 'LISTS', 'DOCUMENTS', and 'HELP'.
- INSIGHTS INTO YOUR BUSINESS**: Located on the left side, pointing to the 'INSIGHTS' section.
- YOUR BOOK OF BUSSINESS INCLUDING:**
 - POLICIES
 - CLIENTS
 - LISTS
- YOUR DOCUMENTS**: Located on the left side, pointing to the 'DOCUMENTS' section.
- YOUR DISTRIBUTOR'S PROFILE**: Located on the left side, pointing to the 'O.G. Insurance' section.
- NOTIFICATIONS**: Located on the right side, pointing to the notifications icon in the toolbar.
- COMMUNICATIONS PANEL**: Located on the right side, pointing to the chat panel.

DATA VIEWS NAVIGATION

PAGE LEVEL SEARCH (points to the search bar at the top left)

CARRIER PROFILES (points to the carrier logos at the top center)

PAGE SETTINGS (HIDE OR DISPLAY MORE COLUMNS) (points to the gear icon in the top right)

ADJUST THE NUMBER OF RESULTS DISPLAYED (points to the 'Show' dropdown menu)

FILTERS (points to the 'FILTER BY' sidebar on the left)

SORT BY COLUMN HEADERS (points to the column headers in the table)

TABLE COLUMNS (points to the 'TABLE COLUMNS' panel on the right)

The interface shows a user profile for Kevin D. Johnson, a search bar, and a list of life policies. The table columns are: Policy No., Policy Owner, Product Name, Type, Carrier, Advisor, and Annual Premium. The table contains 10 rows of data.

Policy No.	Policy Owner	Product Name	Type	Carrier	Advisor	Annual Premium
V2381109	GW GEOFFREY S WILLIAMS	ULPR09	Universal Life	Prudential	KEVIN D JOHNSON	
L9394714	KR KRISTEN M RUSSELL	TERM ESSENTIAL 20	Term 20	Prudential	KEVIN D JOHNSON	\$4
L9377248	JN JENNIFER C NOVAK	TERM ESSENTIAL 30	Term 30	Prudential	KEVIN D JOHNSON	\$3
L9377294	RG RICHARD GREER	TERM ESSENTIAL 30	Term 30	Prudential	KEVIN D JOHNSON	\$4
L9460514	TD TAMMY C DAVIDSON	TERM ESSENTIAL 30	Term 30	Prudential	KEVIN D JOHNSON	\$6
TS00005789	MS MASON SCHNEIDER	Term Life	Other Term	Symetra	KEVIN D JOHNSON	
US70001596	KA KENNETH ARMSTRONG	Index Life	Indexed UL	Symetra	KEVIN D JOHNSON	
US70011960	GG GEORGE GARCIA	Fixed Universal Life Ir	Universal Life	Symetra	KEVIN D JOHNSON	
L9387684	JC JUSTIN L COX	TERM ESSENTIAL 30	Term 30	Prudential	KEVIN D JOHNSON	\$1,9

ACTIVATE & ENGAGE PROGRAM FEATURES

LJ7874467

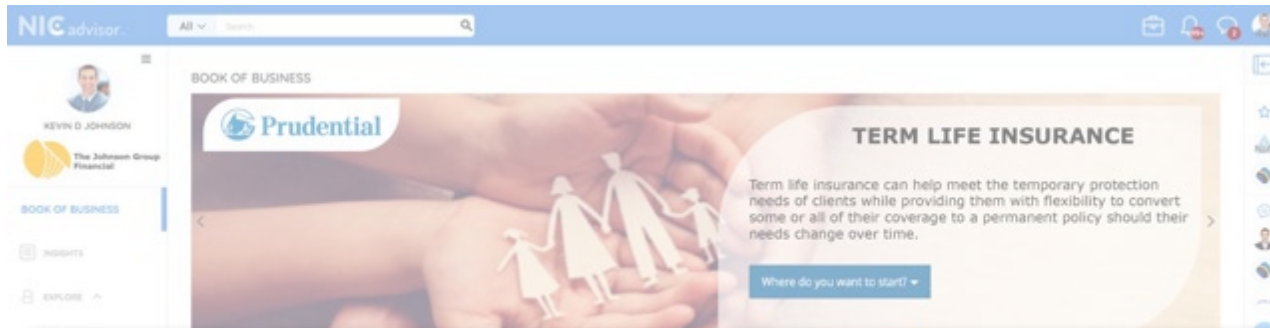
The Activate & Engage Programs provide Agents with access to in force data across multiple Carriers and multiple BGAs

*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



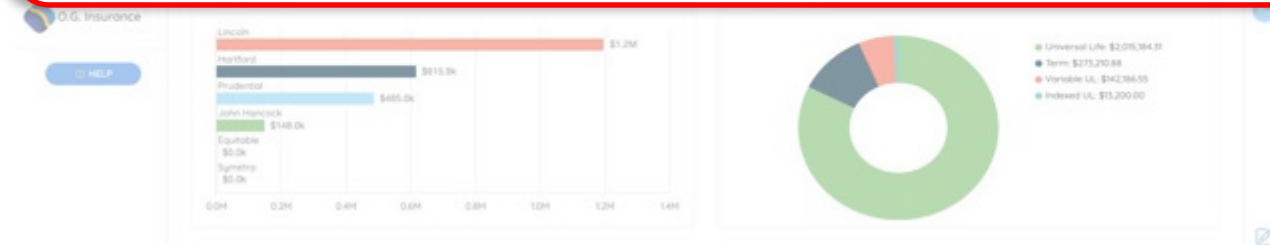
OVERVIEW

Total Annual Premium
\$2,457,667
Policies

Total Cash Value
\$9,532,296
Gross Value

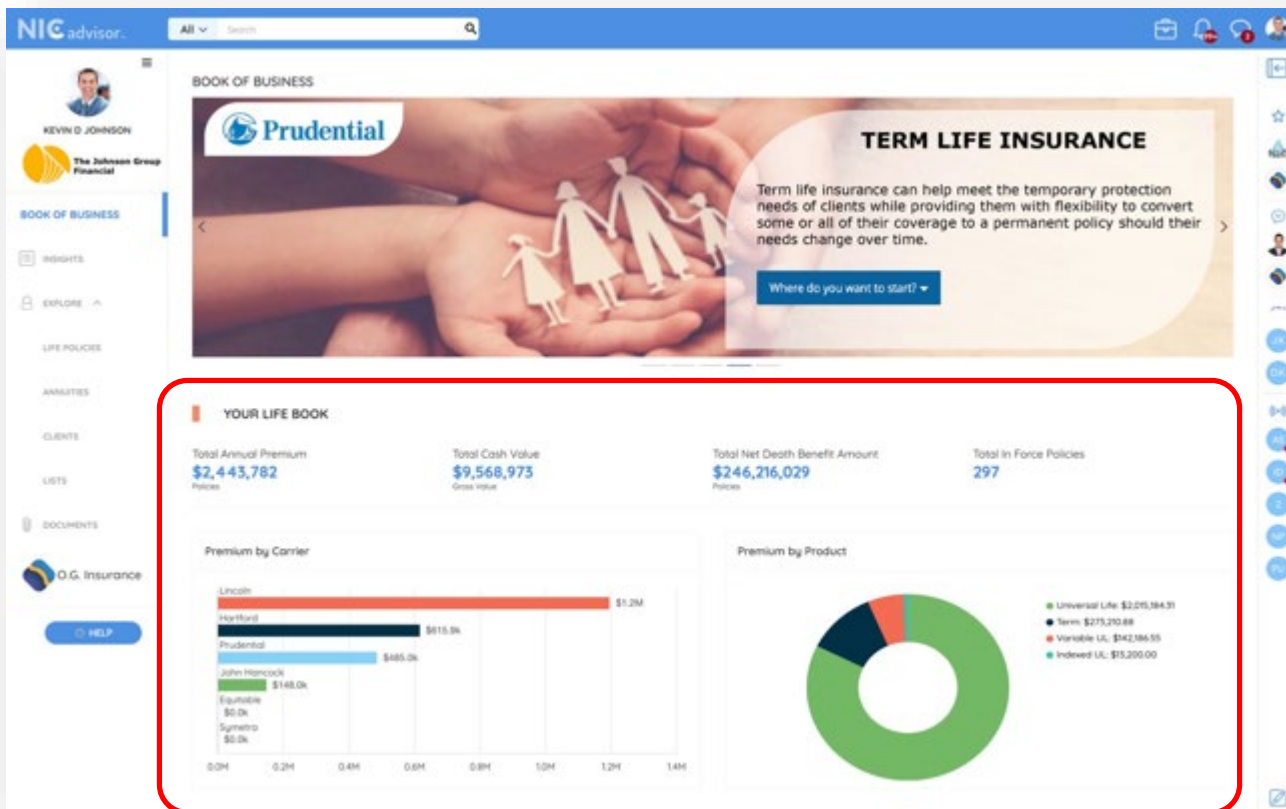
Total Net Death Benefit Amount
\$244,666,029
Policies

Total In Force Policies
297



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

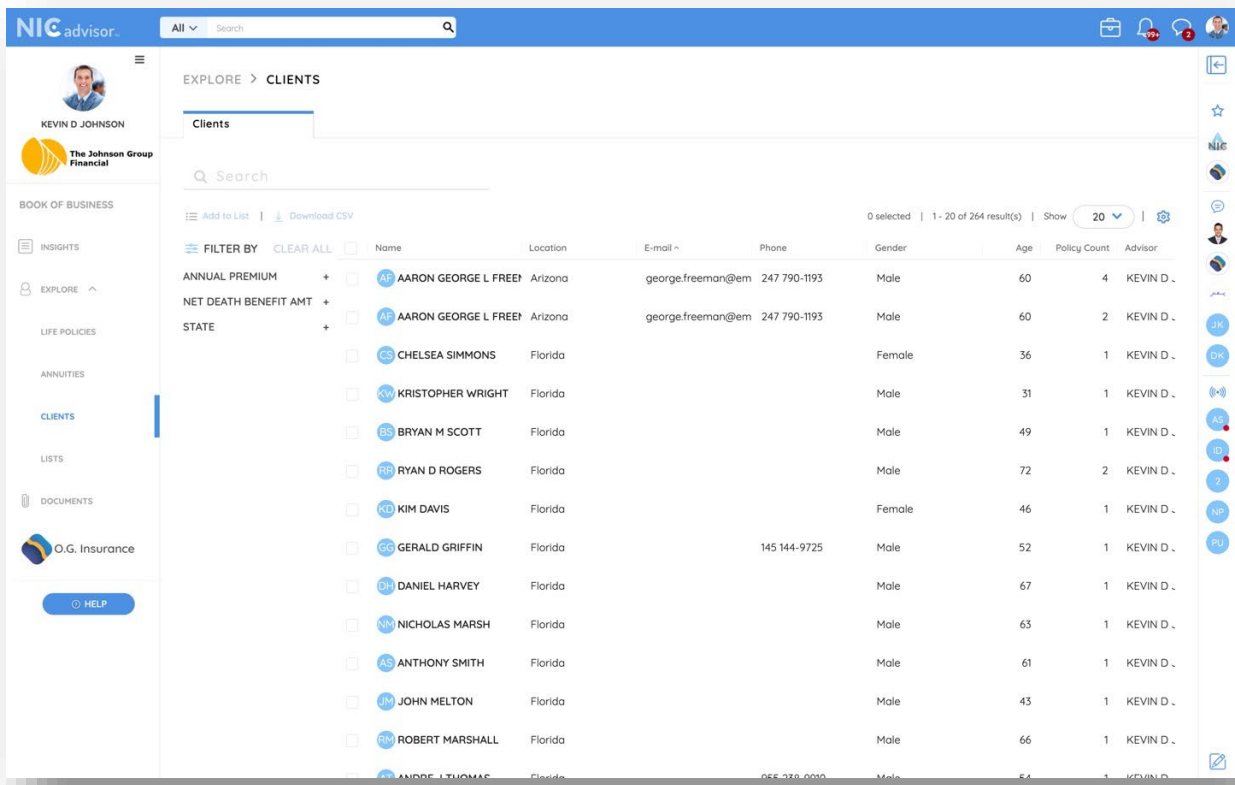
LIFE POLICIES

The screenshot shows the NIC advisor interface for 'LIFE POLICIES'. The top navigation bar includes the user profile 'KEVIN D JOHNSON' and logos for Allianz, Equitable, The Hartford, John Hancock, and Lincoln Financial Group. The left sidebar contains navigation options like 'BOOK OF BUSINESS', 'INSIGHTS', 'EXPLORE', 'LIFE POLICIES', 'ANNUITIES', 'CLIENTS', 'LISTS', and 'DOCUMENTS'. The main content area features a search bar and a table of policies.

	Policy No.	Policy Owner	Product Name	Type	Carrier	Advisor	Annual Pr
POLICY STATUS	L8160260	SMALL INC	TERM ESSENTIAL 10	Term 10	Prudential	KEVIN D JOHNSON	\$5, 5
PRODUCT	L9394439	DANIEL C SWEENEY	TERM ESSENTIAL 20	Term 20	Prudential	KEVIN D JOHNSON	\$7
CARRIER	V2381109	GEOFFREY S WILLIAMS	ULPRO9	Universal Life	Prudential	KEVIN D JOHNSON	
ANNUAL PREMIUM	L9394714	KRISTEN M RUSSELL	TERM ESSENTIAL 20	Term 20	Prudential	KEVIN D JOHNSON	\$4
NET DEATH BENEFIT AMT	L9377248	JENNIFER C NOVAK	TERM ESSENTIAL 30	Term 30	Prudential	KEVIN D JOHNSON	\$3
EFFECTIVE DATE	L9377294	RICHARD GREER	TERM ESSENTIAL 30	Term 30	Prudential	KEVIN D JOHNSON	\$4
INSURED BIRTH DATE	L9387684	JUSTIN L COX	TERM ESSENTIAL 30	Term 30	Prudential	KEVIN D JOHNSON	\$1, 9
TERM CONV EXPIRY DATE	L9460514	TAMMY C DAVIDSON	TERM ESSENTIAL 30	Term 30	Prudential	KEVIN D JOHNSON	\$6
MATURITY DATE	L9226828	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	\$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



- ❖ 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

POLICY STATUS

- Active (Inforce) (7785)
- Lapsed (400)
- Lapse Pending (25)
- Suspend (10)
- Carrier Deferred (4)
- Death Claim Pending (3)
- Paid-up (1)
- Surrendered (1)

PRODUCT

- Universal Life (2155)
- Term 20 (1705)
- Term 10 (1562)
- Term 30 (1084)
- Term 15 (727)
- Variable UI (523)
- Other Term (481)
- Whole Life (156)
- Indexed UI (129)
- Term 65 (7)

CARRIER

- Prudential (5495)
- Lincoln (2402)
- Hartford (1333)
- John Hancock (434)
- Equitable (359)
- Symetra (206)
- Voya (2)

ANNUAL PREMIUM

- < \$2.5k (3645)
- \$2.5k to \$10k (2350)
- \$10k to \$25k (794)
- \$25k to \$50k (348)
- > \$50k (471)

NET DEATH BENEFIT AMT

- < \$100k (254)
- \$100k to \$1m (3296)
- \$1m to \$5m (397)
- \$5m to \$10m (454)
- > \$10m (31)

EFFECTIVE DATE

INSURED BIRTH DATE

2 of 8,025 result(s) | Show 100

TABLE COLUMNS

- Policy No.
- Policy Owner
- Product Name
- Type
- Carrier
- Advisor
- Annual Premium
- Death Benefit Amount
- Net Death Benefit Amount

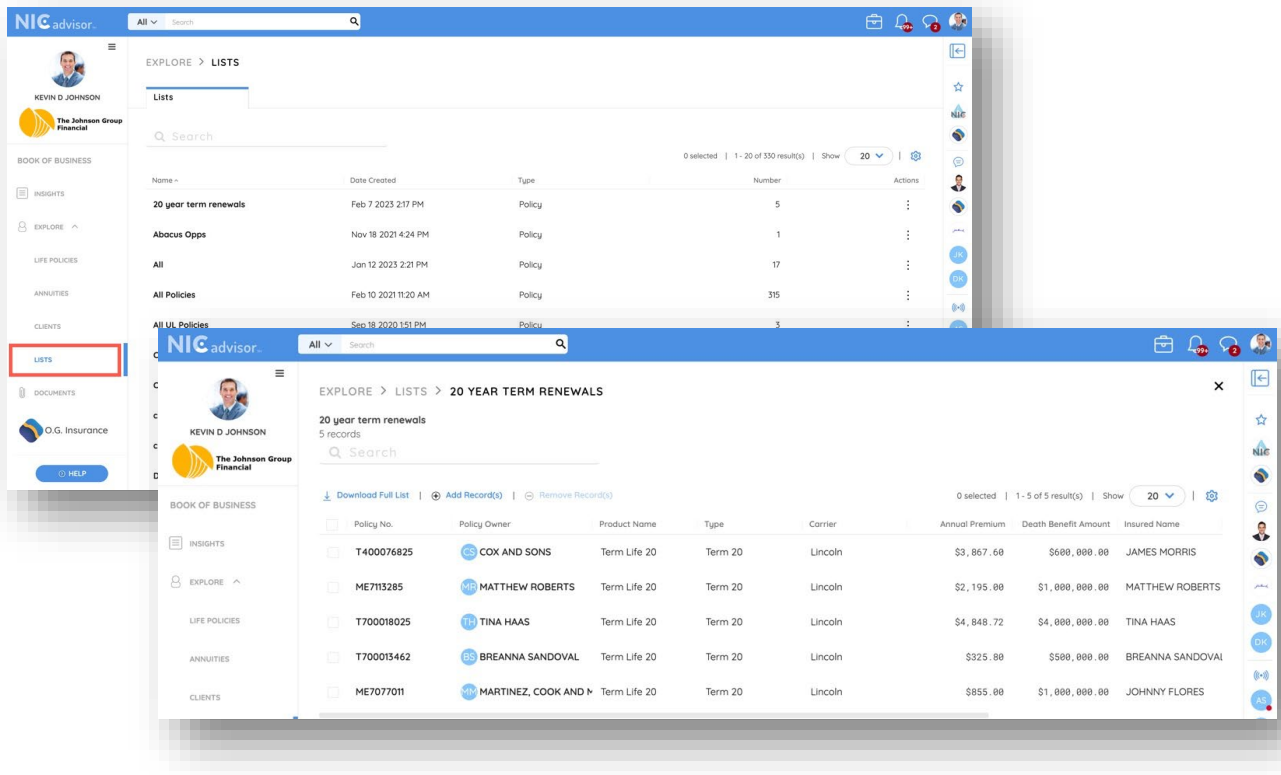
DONE

0 selected | 1 - 100 of 8,025 result(s) | Show 100

<input type="checkbox"/>	Policy No.	Policy Owner	Type	Carrier	Advisor	Effective Date	Gross Cash Value
<input type="checkbox"/>	L9221431	WYATT J HAWKINS	Term 20	Prudential	RICHARD A HAYES	Apr 18, 2015	\$0.00
<input type="checkbox"/>	L9154279	BENJAMIN S SMITH	Term 20	Prudential	MATTHEW R JOHNSK	Jan 7, 2015	\$0.00
<input type="checkbox"/>	L9189589	BROCK INC	Term 20	Prudential	MATTHEW R JOHNSK	Aug 5, 2015	\$0.00
<input type="checkbox"/>	L9391036	FLOWERS PLC	Term 15	Prudential	MATTHEW R JOHNSK	Sep 8, 2016	\$0.00
<input type="checkbox"/>	V2064447	PATTERSON LTD	Universal Life	Prudential	ALAN T OLSON	Jul 16, 2009	\$67,696.01
<input type="checkbox"/>	L8021588	RYAN B BLAIR	Term 10	Prudential	JOHN L ASHLEY	Jul 12, 2006	\$0.00
<input type="checkbox"/>	L8023560	GATES AND SONS	Term 20	Prudential	JOHN L ASHLEY	Aug 9, 2006	\$0.00
<input type="checkbox"/>	L9264452	JOHN B LEACH	Term 20	Prudential	JIMMY A SANCHEZ	Oct 4, 2015	\$0.00
<input type="checkbox"/>	L8086616	JUSTIN S OSBORN	Term 30	Prudential	GREGORY J JONES	Apr 14, 2007	\$0.00

- ❖ 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

LISTS



- ❖ Create lists from search results
- ❖ Maintain and manage lists, download list and share lists



POLICY OWNER / ANNUITANT PROFILE

NIC advisor | All | Search

... > PETER ROTH > DAVID BERTOILLI > ANNE-MARIE MURPHY

Anne-Marie Murphy
POLICY OWNER

Email: anne.marie.murphy@mail.com
Phone: 1 900 293-2123

Last Chat: March 22, 2018
Address: 95 California Street, SF, CA, 90210, USA

CHAT

Life | Annuities | Documents | Opportunities

Anne-Marie Murphy's Policies | EXPAND ALL

Prudential	ULPR09	Policy No. 0000M38488
ADD POLICY EVENT WATCH POLICY REQUEST ILLUSTRATION POLICY CHANGES VIEW DETAILS	Prudential Life Universal Life Insured: Jeff Sebasten Franklyn Murphy Anne-Marie Murphy 0 Pending Notifications	Death Benefit Amount: \$100,000,000.00 Modal Premium: \$300.00/pay 11 times a year Policy Status: Active (in force) Issue State: Washington

John Hancock	PROTECTION UNIVERSAL LIFE 07	Policy No. 0000M38488
ADD POLICY EVENT WATCH POLICY REQUEST ILLUSTRATION POLICY CHANGES VIEW DETAILS	John Hancock Life Universal life Insured: Jeff Sebasten Franklyn Murphy Anne-Marie Murphy 0 Pending Notifications	Death Benefit Amount: \$90,000,000.00 Modal Premium: \$330.00/pay 11 times a year Policy Status: Active (in force) Issue State: Washington

Copyright Insured Connect | Last Updated 2017/10/16 | Legal Notice | Privacy Policy

- 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

The screenshot displays the NIC Policy Details interface for Anna-Marie Murphy's Protection Universal Life 07 policy. The interface is organized into several sections:

- INSURED:** A table with columns for Name, Date of Birth, At Age Issue, Gender, Tobacco Status, and Underwriting Class. The insured is CURTIS RICE, born Dec 7, 1949, Male.
- BENEFICIARY:** YOUNG INC, DEAN LEE, GARCIA-HALL.
- ADVISOR:** ROBERT J STOKES.
- DISTRIBUTOR:** O.G. INSURANCE.
- PAYMENTS:** A table with columns for Policy Effective Date, Last Premium Payment Date, Payment Method, Annual Premium, Last Premium Payment Amount, and Cumulative Premium Paid. The policy is effective from Jan 20, 2015, with an annual premium of \$6,355.80 and a cumulative premium paid of \$529.65.
- CASH VALUE:** A table with columns for Accumulation Value and Cash Surrender Value.
- DEATH BENEFITS:** A table with columns for Net Death Benefit Amount and Death Benefit Option. The net death benefit amount is \$5,000,000.00.
- RIDERS:** A table with columns for Name, Amount of Insurance, and Annual Premium. It lists Term Level Death Benefit for \$5,000,000.00 and Accidental Death Benefit for \$0.00.

Policy details including:

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

Data Insights & Sales Opportunities



Data Insights & Sales Opportunities

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

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

INSIGHTS

The top screenshot displays the 'LIFE INSIGHTS BOOK' for Kevin D. Johnson. Key metrics include Total Annual Premium (\$2,443,782), Total Cash Value (\$9,568,973), Total Net Death Benefit Amount (\$246,216,029), and Total In Force Policies (297). A table shows Policy Values and Policy Status. A red box highlights the 'ALL CARRIERS' dropdown menu.

Category	Value
Total Annual Premium	\$2,443,782
Total Cash Value	\$9,568,973
Total Net Death Benefit Amount	\$246,216,029
Total In Force Policies	297

Policy Values	Policy Status
Total Cash Value	In Force: 297
Total Net Death Benefit Amount	Loose Pending: 5
Total Net Surrender Value Amount	Grace Period: 0
Total Annual Premium	Lapsed: 15
	Suspend: 3
	Surrendered: 0
	Death Claim Paid: 0
	Death Claim Pending: 0

The bottom screenshot shows the 'LIFE > LAPSED' view with a table of 15 lapsed policies. The table includes columns for Policy No., Policy Owner, Product Name, Type, Carrier, Advisor, and Annual Pr.

Policy No.	Policy Owner	Product Name	Type	Carrier	Advisor	Annual Pr.
L8M0260	SMALL INC	TERM ESSENTIAL 10	Term 10	Prudential	KEVIN D. JOHNSON	\$5.5
L9460514	TAMMY C DAVIDSON	TERM ESSENTIAL 30	Term 30	Prudential	KEVIN D. JOHNSON	\$6
L9265335	JESSICA J BELL	TERM ESSENTIAL 30	Term 30	Prudential	KEVIN D. JOHNSON	\$6
L8682089	WILLIAM HALL	TERM ESSENTIAL 20	Term 20	Prudential	KEVIN D. JOHNSON	\$7.2
L9566992	ANTHONY MORRISON	TERM ESSENTIAL 20	Term 20	Prudential	KEVIN D. JOHNSON	\$2.8
V2352358	SAMUEL H ANDERSON	ULPR09	Universal Life	Prudential	KEVIN D. JOHNSON	\$8.4
L877423	STEVEN ARMSTRONG	TERM ESSENTIAL 30	Term 30	Prudential	KEVIN D. JOHNSON	\$1.8
L8792395	STEVEN ARMSTRONG	TERM ESSENTIAL 30	Term 30	Prudential	KEVIN D. JOHNSON	\$1.1
V2356888	CALEB L LOPEZ	ULA202	Universal Life	Prudential	KEVIN D. JOHNSON	\$6
V2305074	ANDRE J THOMAS	ULPR09	Universal Life	Prudential	KEVIN D. JOHNSON	
L9580767	BECKY ROBERTSON	TERM ESSENTIAL 30	Term 30	Prudential	KEVIN D. JOHNSON	\$6
L8734859	JAMES H DOMINGUEZ	TERM ESSENTIAL 20	Term 20	Prudential	KEVIN D. JOHNSON	\$6.9
L932546	MATTHEW KENNEDY	TERM ESSENTIAL 30	Term 30	Prudential	KEVIN D. JOHNSON	\$6.1

- ❖ 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

The screenshot displays the NIC Advisor interface for Kevin D. Johnson. The 'Opportunities' tab is active, showing a 'LIFE INSIGHTS BOOK' with a dropdown for 'ALL CARRIERS'. Key metrics are displayed: Total Annual Premium (\$10,247,739), Total Cash Value (\$50,944,438), Total Net Death Benefit Amount (\$792,563,543), and Total In Force Policies (393). The 'SALES AND SERVICE OPPORTUNITIES' filter panel is highlighted with a red box, containing dropdowns for 'Vendor' (ALL CARRIERS) and 'Product' (Indexed UL), and date pickers for 'Effective Date', 'Term Conv Expiry Date', 'Maturity Date', and 'Insured Birth Date'. A 'CREATE LIST' button is located at the bottom of this panel. The main dashboard also shows 'MATURITY OPPORTUNITIES' and 'RENEWAL OPPORTUNITIES' sections.

- ❖ 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

The screenshot displays the NIC Advisor interface with a 'CONVERSION OPPORTUNITIES' pop-up window. The pop-up window is titled 'CONVERSION OPPORTUNITIES' and lists the following opportunities:

Carrier	Term	Count	Info Icon
John Hancock	-	-	Info Icon
Term 20	-	8	Info Icon
Term 15	-	6	Info Icon
Term 10	-	5	Info Icon
Prudential	-	-	Info Icon
Term 10	-	1	Info Icon

- ❖ 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

RENEWAL OPPORTUNITIES

Term Policies (Over 10 years old)	1,049
Term 1 Policies (Renewing in the next 3 months)	0
Term 1 Policies (Renewing in the next 6 months)	0
Term 5 Policies (Renewing in the next 3 months)	0
Term 5 Policies (Renewing in the next 6 months)	0
Term 10 Policies (Renewing in the next 3 months)	20
Term 10 Policies (Renewing in the next 6 months)	48
Term 15 Policies (Renewing in the next 3 months)	9
Term 15 Policies (Renewing in the next 6 months)	21
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
Term 35 Policies (Renewing in the next 6 months)	0
Term 40 Policies (Renewing in the next 3 months)	0
Term 40 Policies (Renewing in the next 6 months)	0
Other Term Policies (Renewing in the next 3 months)	0
Other Term Policies (Renewing in the next 6 months)	0
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

Category	Value
Total Annual Premium	\$2,445,782
Total Cash Value	\$9,568,973
Total Net Death Benefit Amount	\$246,256,029
Total In Force Policies	297

Category	Value
Total Cash Value	\$9,568,973
Total Net Death Benefit Amount	\$246,256,029
Total Net Surrender Value Amount	\$908,562.99
Total Annual Premium	\$2,445,781.74

Category	Value
New In Force Policies (Last 30 days)	0
New In Force Policies (Last 60 days)	0
New In Force Policies (Last 90 days)	0
New In Force Policies (Last 1 year)	37
Total In Force Policies	297

Category	Value
Total UL	150
Total Annual Premium of UL	\$2,075,184.31
Total Variable UL	37
Total Annual Premium of Variable UL	\$142,184.45
Total Indebted UL	4
Total Annual Premium of Indebted UL	\$93,000.00

MATURITY OPPORTUNITIES	
Policies maturing in the next 30 days	5
Policies maturing in the next 60 days	10
Policies maturing in the next 90 days	13
Policies maturing in the next 120 days	16
Policies maturing in the next 180 days	16
Policies maturing in the next 360 days	16

- ❖ 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)

SALES AND SERVICE OPPORTUNITIES

Vendor

Product

Effective Date

Term Conv Expiry Date

Maturing Date

Insured Birth Date

CREATE LIST

MATURITY OPPORTUNITIES

Policies maturing in the next 30 days: 4

Policies maturing in the next 60 days: 10

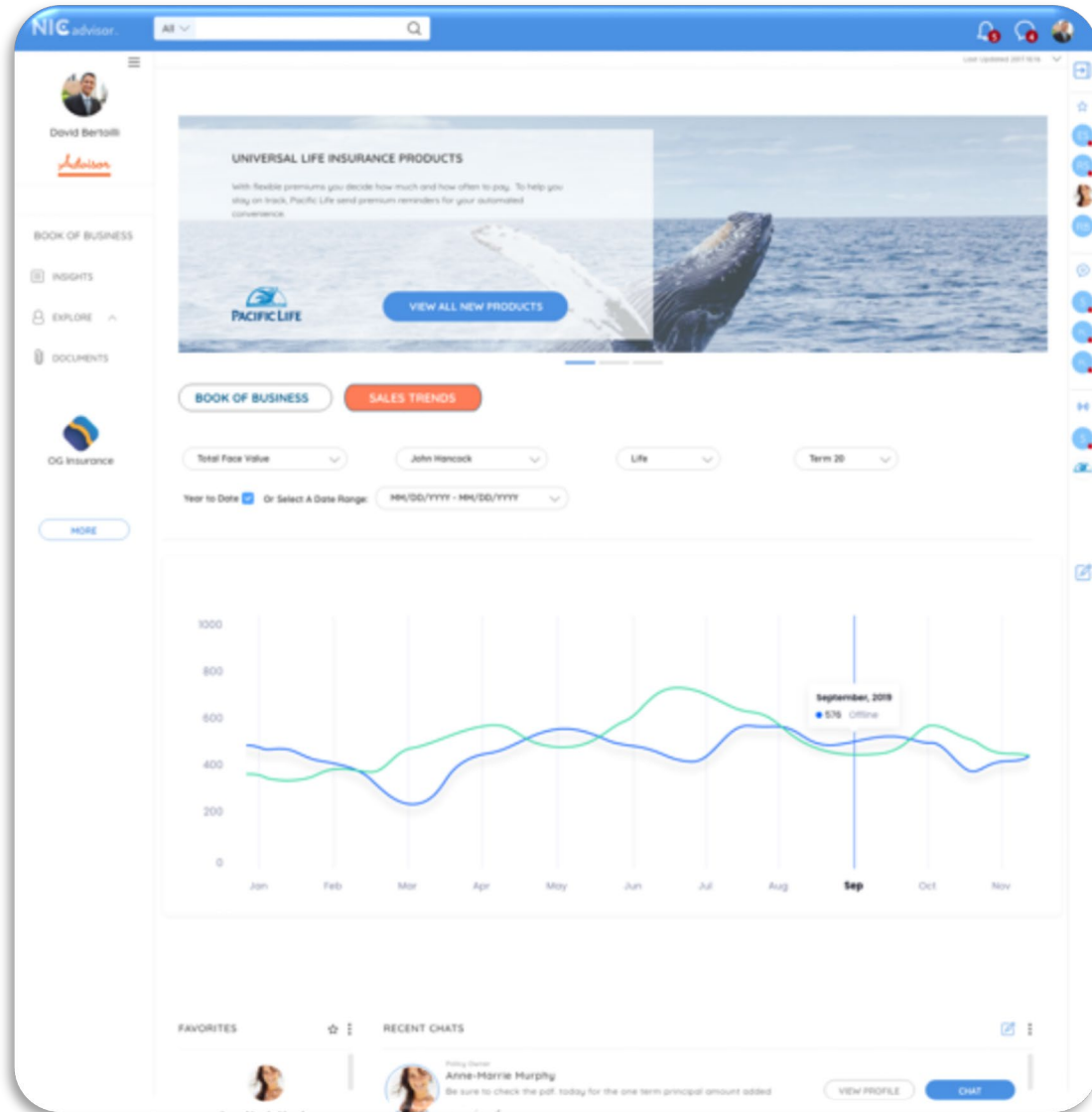
Policies maturing in the next 90 days: 12

Policies maturing in the next 120 days: 15

Policies maturing in the next 180 days: 16

Policies maturing in the next 360 days: 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

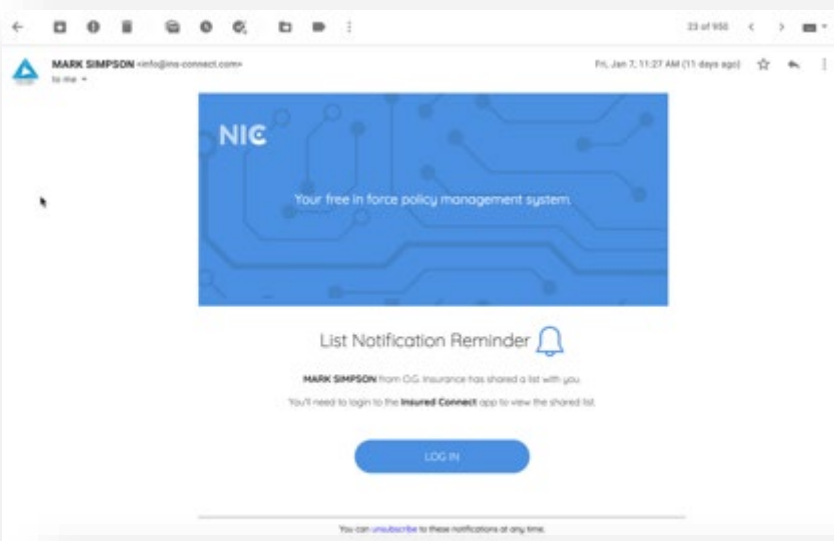


Notifications & Alerts

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

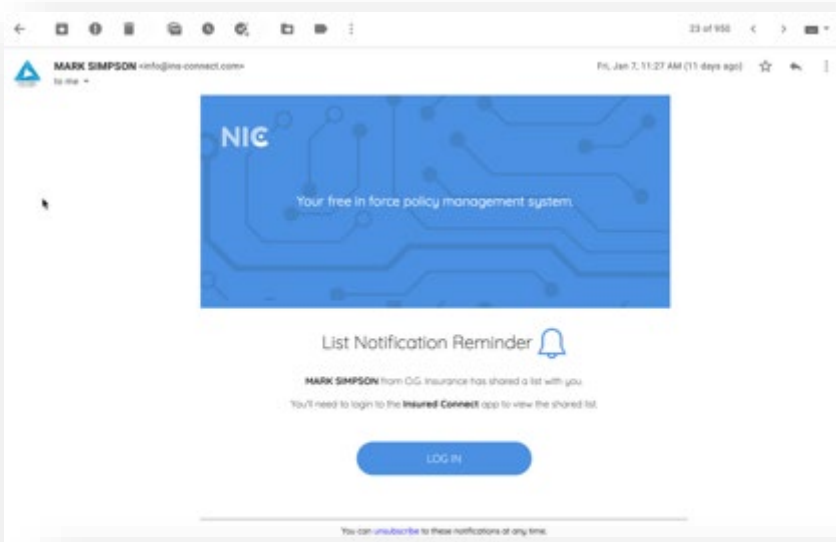


IN APP NOTIFICATION

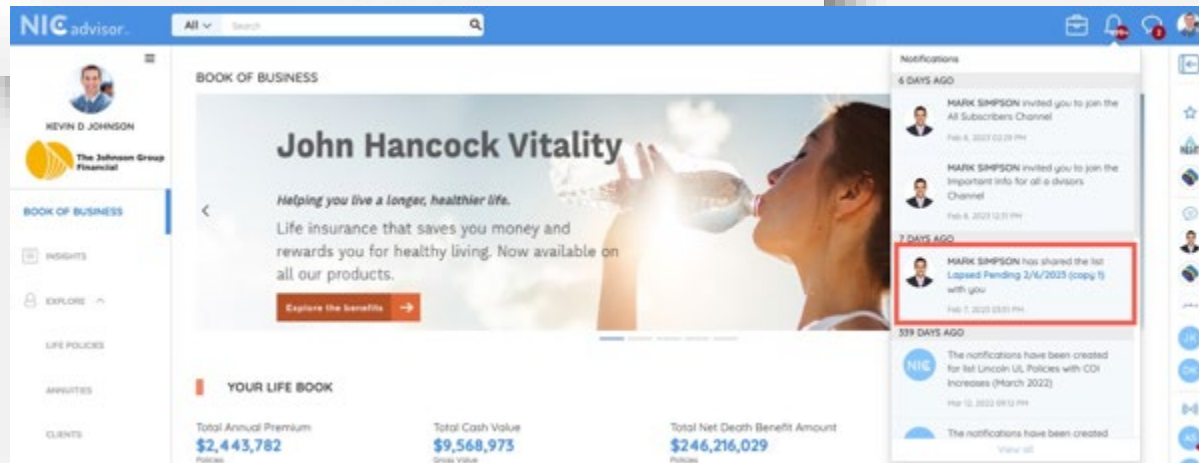


- ❖ Each Agent on the list gets an email notification as well as in app notification
- ❖ Email notification lets the Agent know that there is a list waiting for them and they need to log into the NIC Agent App to view
- ❖ Clicking on the in-app notification takes the Agent directly to the list of policies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

SALES OPPORTUNITY NOTIFICATIONS

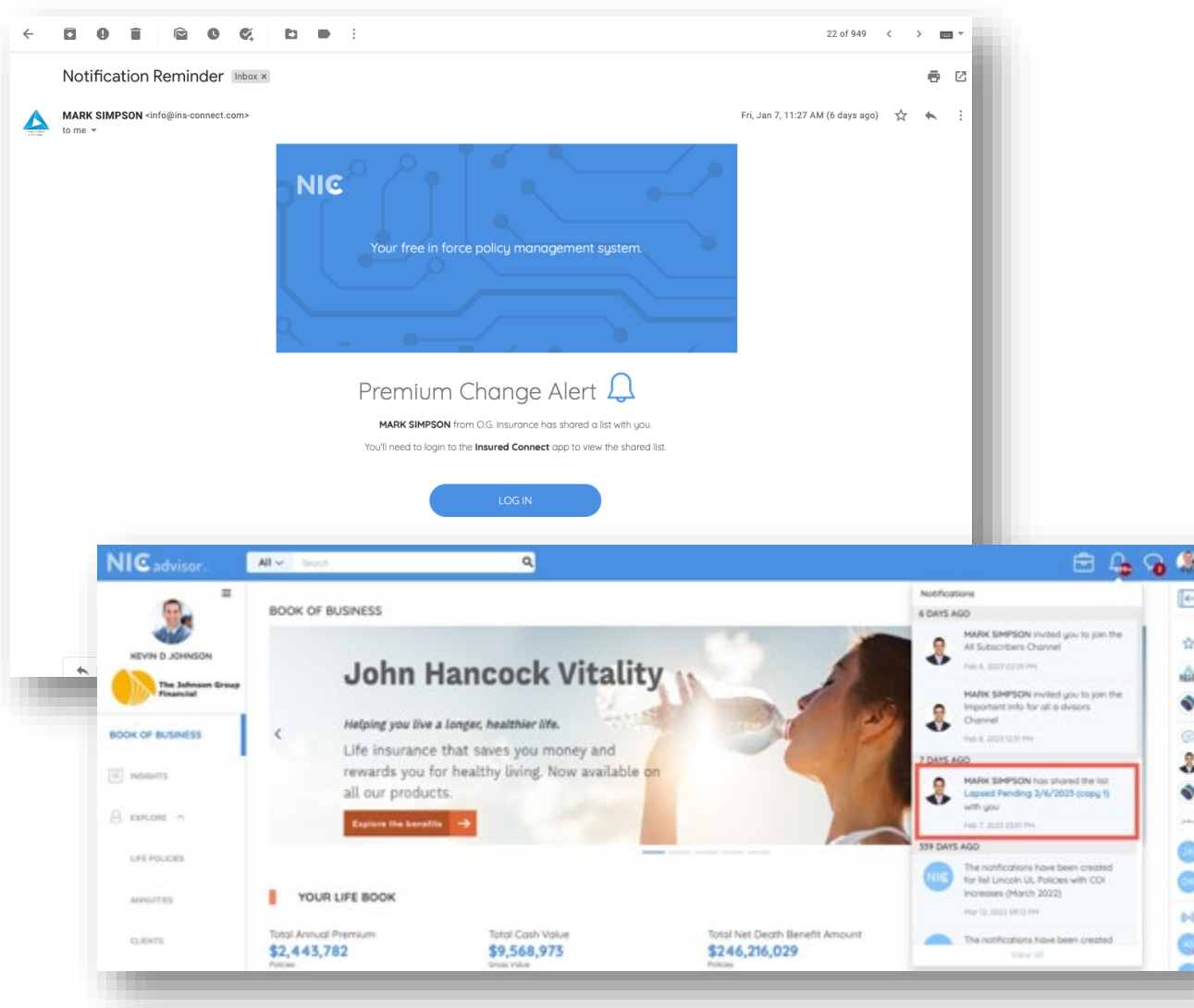


IN APP NOTIFICATION



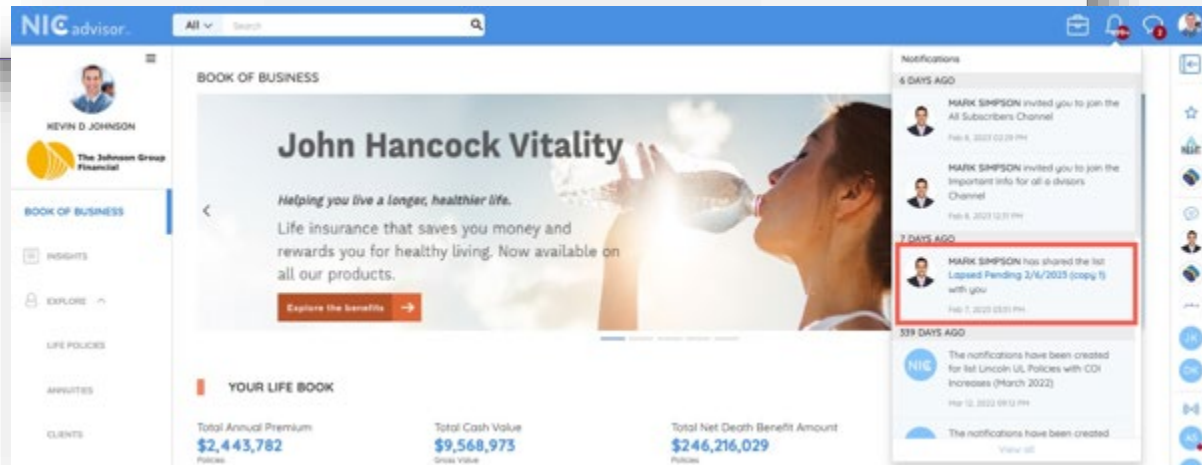
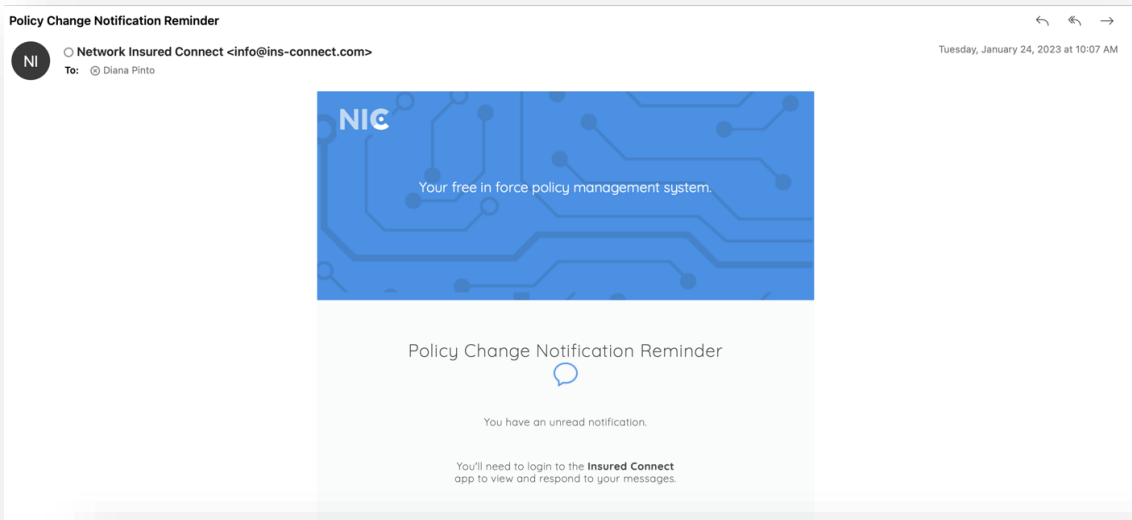
- ❖ Ability to create:
 - ✓ Custom reminders on policies
 - ✓ General reminders about broader services that apply to a policy

POLICY WATCH NOTIFICATIONS



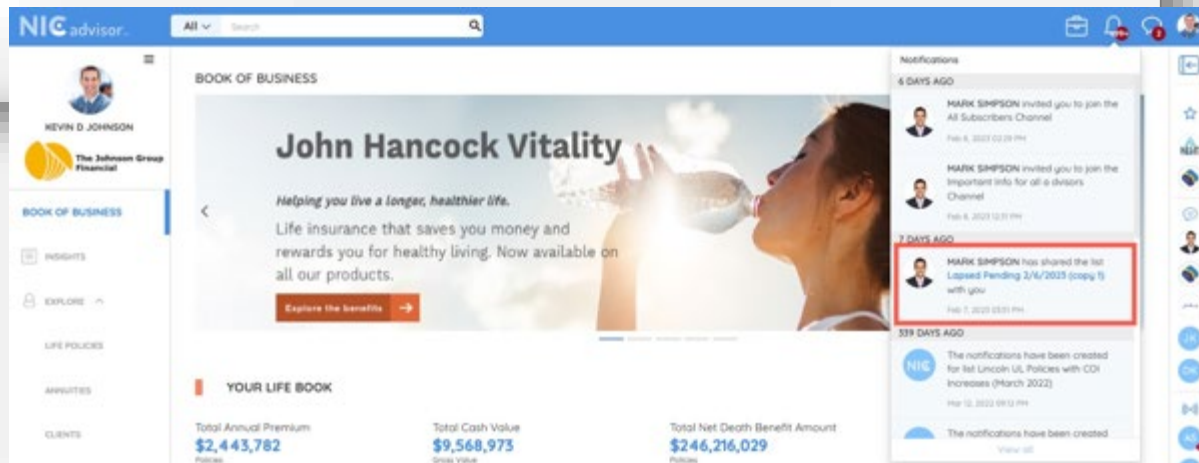
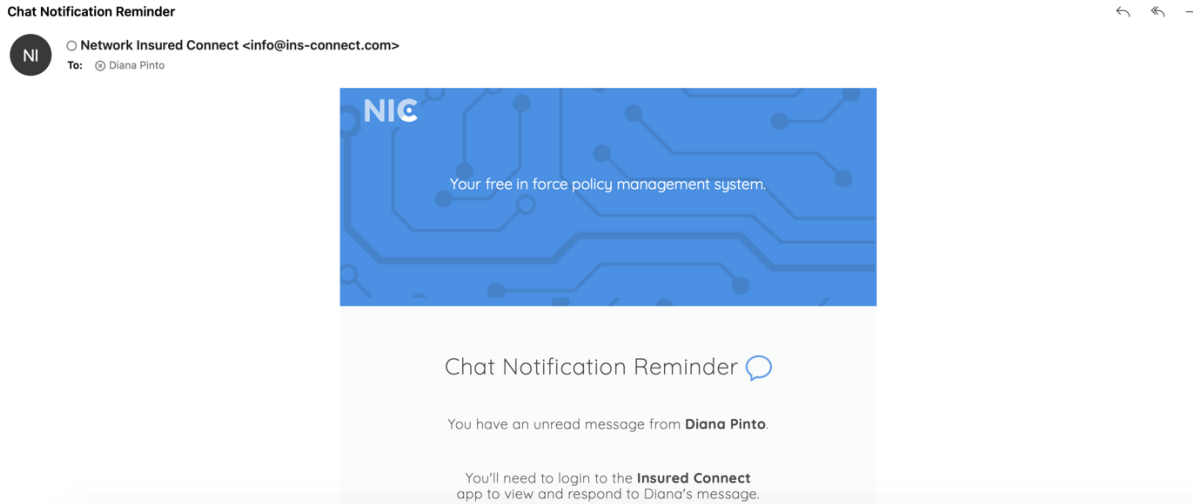
- ❖ Ability to create:
 - ✓ Custom reminders on policies
 - ✓ General reminders about broader services that apply to a policy

POLICY EVENT NOTIFICATIONS



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

COMMUNICATION NOTIFICATIONS



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

BGA – Agent Engagement



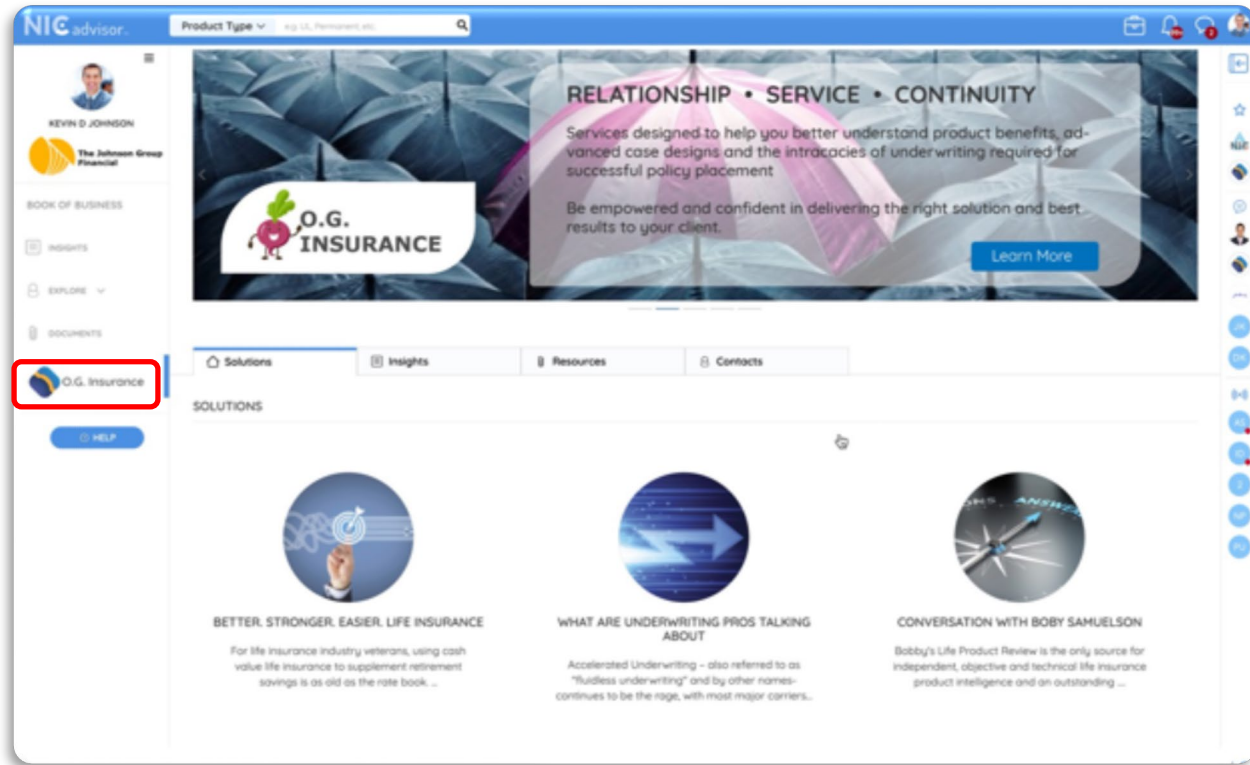
BGA – Agent Engagement

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

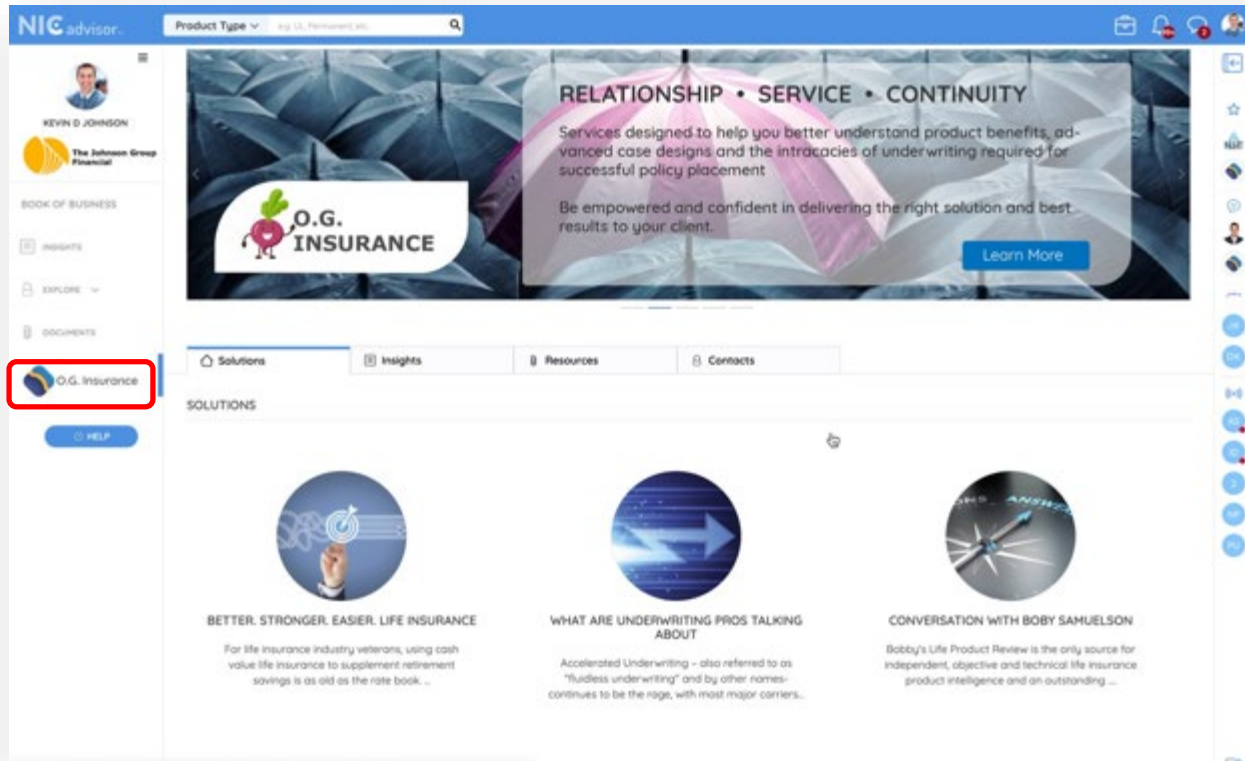
AGENT MARKETING



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

BGA PROFILE



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

Note: content is provided by the Distributor

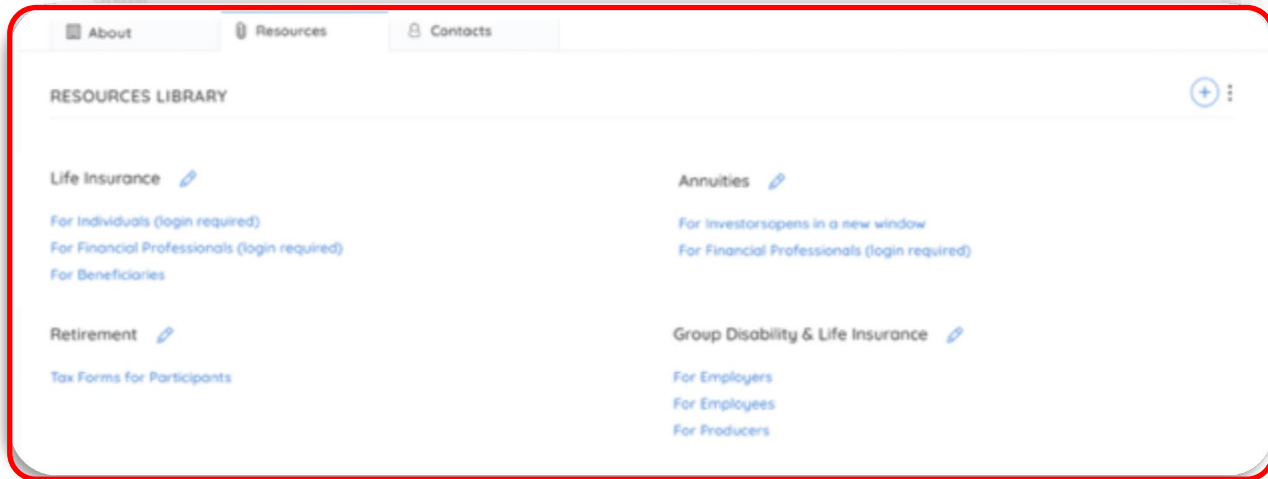
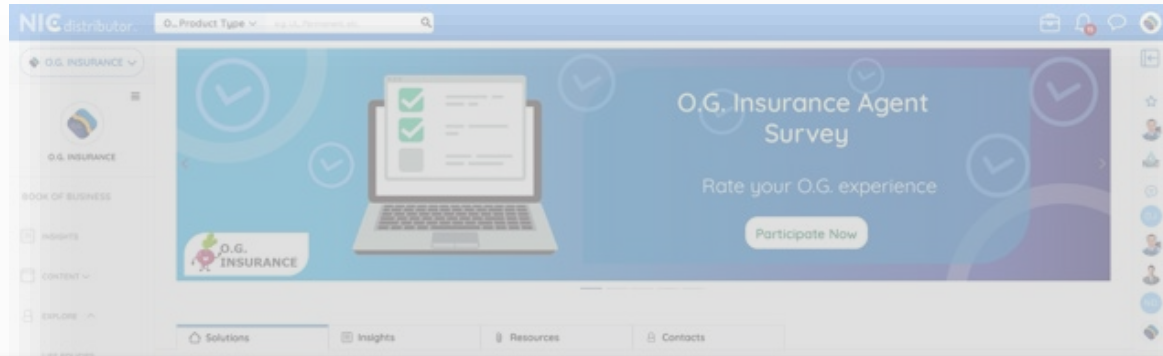
BGA SALES MANAGERS

The screenshot displays the NIC Adviser web application. The user is logged in as David Bertoli. The interface includes a navigation sidebar with options like 'BOOK OF BUSINESS', 'INSIGHTS', 'CONTACTS', and 'DOCUMENTS'. A red box highlights the 'O.G. Insurance' logo in the sidebar. The main content area features a banner for 'ADVANCED ILLUSTRATIONS WEBINAR SERIES' and a 'CONTACTS' section with three contact cards for 'HEAD OFFICE', 'Sam Smith (Principal)', and 'Robert Johnson (Principal)'. Below the contacts is a 'SALES MANAGER' section for Johnny English.

- ❖ Access to Distributor Sales Managers
- ❖ Ability to communicate with Sales Managers through NIC

Note: Sale Managers are set by Distributors

BGA RESOURCES



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

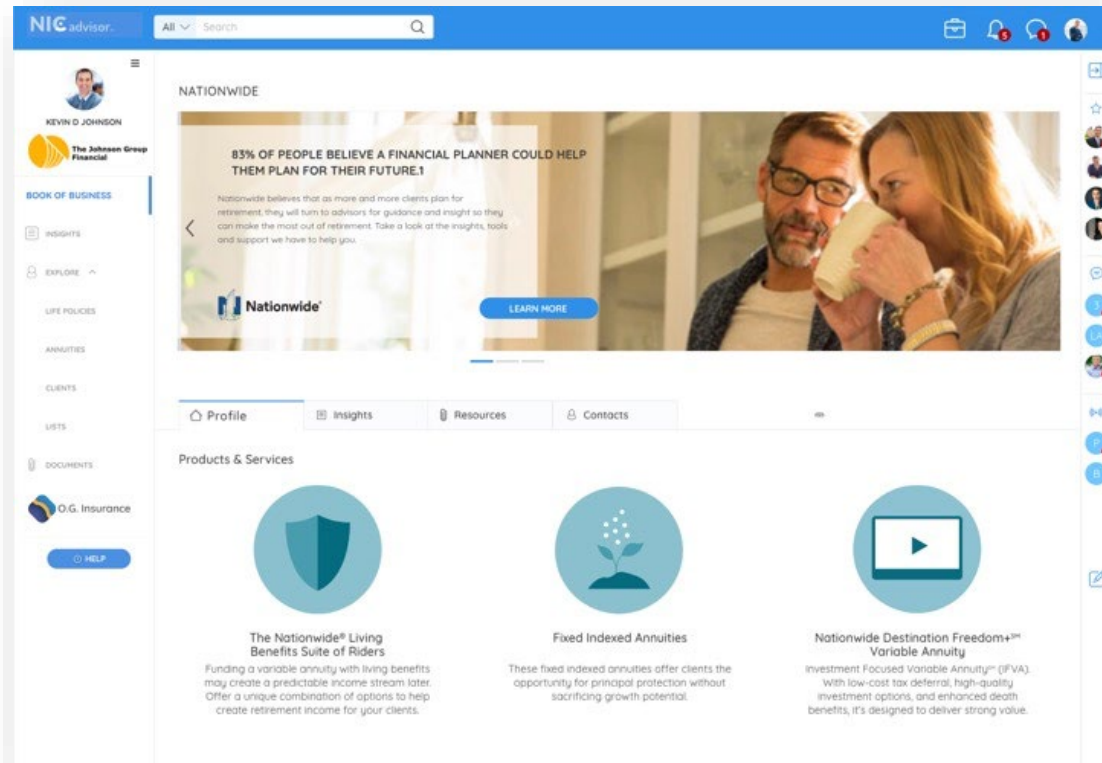
Carrier Profiles



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.

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

The screenshot displays the NIC Advisor web application. At the top, there is a blue header with the 'NIC advisor' logo, a search bar, and navigation icons. A left sidebar contains a user profile for Kevin D. Johnson, 'The Johnson Group Financial', and a 'BOOK OF BUSINESS' menu with categories like INSIGHTS, EXPLORE, LIFE POLICIES, ANNUITIES, CLIENTS, LISTS, and DOCUMENTS. The main content area features a 'NATIONWIDE' banner with a headline: '83% OF PEOPLE BELIEVE A FINANCIAL PLANNER COULD HELP THEM PLAN FOR THEIR FUTURE.1'. Below the banner is a 'LEARN MORE' button. Underneath, there are tabs for 'Profile', 'Insights', 'Resources', and 'Contacts'. The 'Products & Services' section is visible, containing three items: 'The Nationwide® Living Benefits Suite of Riders', 'Fixed Indexed Annuities', and 'Nationwide Destination Freedom+™ Variable Annuity'. Each item has a circular icon and a brief description.

❖ Access to Carrier products and services

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

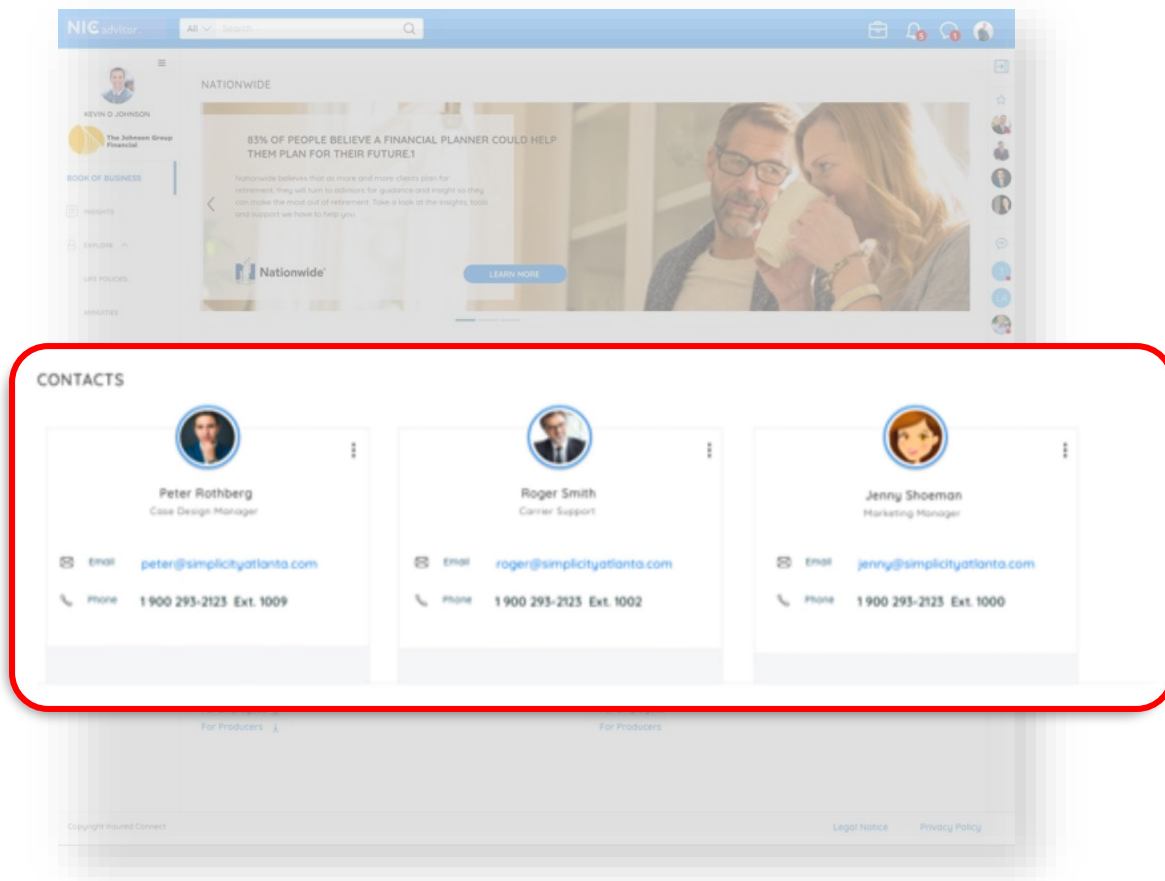
CARRIER RESOURCES

The screenshot displays the NIC advisor interface. At the top, there is a search bar and navigation icons. The main content area features a banner for Nationwide with the headline "83% OF PEOPLE BELIEVE A FINANCIAL PLANNER COULD HELP THEM PLAN FOR THEIR FUTURE.1". Below the banner is a "FORMS LIBRARY" section with a grid of resource categories: Mutual Funds & Investments, Retirement, Group Disability & Life Insurance, Life Insurance, and Annuities. Each category lists specific forms and links to download them. The footer includes "Copyright Insured Connect", "Legal Notice", and "Privacy Policy".

❖ Access to Carrier documents, forms, apps, etc.

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

CARRIER CONTACTS



- ❖ Access to Carrier contacts and departments

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

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

GLOBAL SEARCH

The screenshot displays the NIC advisor application interface. At the top, there is a search bar with a dropdown menu set to 'All' and a search icon. Below the search bar, the application shows search results for a specific query, displaying 589 items. The results are organized into a table with columns for Policy No., Policy Owner, Product Name, Type, Carrier, Advisor, and Annual P. The table lists various policies, including those owned by SMALL INC, DANIEL C SWEENEY, GEOFFREY S WILLIAMS, KRISTEN H RUSSELL, JENNIFER C NOVAK, RICHARD GREER, JUSTIN L COX, TAMMY C DAVIDSON, GERALD GRIFFIN, RYAN LOPEZ, MARY BROWN, RYAN YOUNG, and MICHAEL PAYNE.

Policy No.	Policy Owner	Product Name	Type	Carrier	Advisor	Annual P
L8960260	SMALL INC	TERM ESSENTIAL 10	Term 10	Prudential	KEVIN D JOHNSON	\$5.5
L9394439	DANIEL C SWEENEY	TERM ESSENTIAL 20	Term 20	Prudential	KEVIN D JOHNSON	\$7
V2581109	GEOFFREY S WILLIAMS	ULPROP	Universal Life	Prudential	KEVIN D JOHNSON	
L9384794	KRISTEN H RUSSELL	TERM ESSENTIAL 20	Term 20	Prudential	KEVIN D JOHNSON	\$4
L9377248	JENNIFER C NOVAK	TERM ESSENTIAL 30	Term 30	Prudential	KEVIN D JOHNSON	\$3
L9377294	RICHARD GREER	TERM ESSENTIAL 30	Term 30	Prudential	KEVIN D JOHNSON	\$4
L9387684	JUSTIN L COX	TERM ESSENTIAL 30	Term 30	Prudential	KEVIN D JOHNSON	\$1.9
L9460514	TAMMY C DAVIDSON	TERM ESSENTIAL 30	Term 30	Prudential	KEVIN D JOHNSON	\$6
L9226828	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	\$4
L9267738	RYAN YOUNG	TERM ESSENTIAL 30	Term 30	Prudential	KEVIN D JOHNSON	\$5
L9349602	MICHAEL PAYNE	TERM ESSENTIAL 30	Term 30	Prudential	KEVIN D JOHNSON	\$1.4

- ❖ 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

POLICY OWNER & ANNUITANT SEARCH

The screenshot shows the NIC advisor interface with a search dropdown menu open. The dropdown menu is filtered to show 'Policy Owner' and 'Annuitant' under the 'Clients' category. The search results table displays the following data:

	Location	E-mail	Phone	Gender	Age	Policy Count	Advisor
ANNUAL PREMIUM +	FLORIDA			Female	36	1	KEVIN D
NET DEATH BENEFIT AMT +	FLORIDA			Male	31	1	KEVIN D
STATE +	FLORIDA			Male	49	1	KEVIN D
	FLORIDA			Male	72	2	KEVIN D
	FLORIDA			Female	46	1	KEVIN D
	FLORIDA		145 144-9725	Male	52	1	KEVIN D
	FLORIDA			Male	67	1	KEVIN D
	FLORIDA			Male	61	1	KEVIN D
	FLORIDA			Male	43	1	KEVIN D
	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

Product Type

SEARCH > SEARCH RESULTS FOR ""

Search results for : "" : 320 item(s)

Life Policies (320)

0 selected | 1 - 100 of 320 result(s) | Show 100

FILTER BY	CLEAR ALL	Policy No.	Policy Owner	Product Name	Type	Carrier	Advisor	Annual P
POLICY STATUS	+	L8160260	SMALL INC	TERM ESSENTIAL 10	Term 10	Prudential	KEVIN D JOHNSON	\$5, 4
PRODUCT	+	L9394439	DANIEL C SWEENEY	TERM ESSENTIAL 20	Term 20	Prudential	KEVIN D JOHNSON	\$7
CARRIER	+	V2381109	GEOFFREY S WILLIAMS	ULPR09	Universal Life	Prudential	KEVIN D JOHNSON	
ANNUAL PREMIUM	+	L9394714	KRISTEN M RUSSELL	TERM ESSENTIAL 20	Term 20	Prudential	KEVIN D JOHNSON	\$4
NET DEATH BENEFIT AMT	+	L9377248	JENNIFER C NOVAK	TERM ESSENTIAL 30	Term 30	Prudential	KEVIN D JOHNSON	\$3
EFFECTIVE DATE	+	L9377294	RICHARD GREER	TERM ESSENTIAL 30	Term 30	Prudential	KEVIN D JOHNSON	\$4
INSURED BIRTH DATE	+	L9460514	TAMMY C DAVIDSON	TERM ESSENTIAL 30	Term 30	Prudential	KEVIN D JOHNSON	\$6
TERM CONV EXPIRY DATE	+	TS00005789	MASON SCHNEIDER	Term Life	Other Term	Symetra	KEVIN D JOHNSON	
MATURITY DATE	+	US70001396	KENNETH ARMSTRONG	Index Life	Indexed UL	Symetra	KEVIN D JOHNSON	
		US70011960	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 .

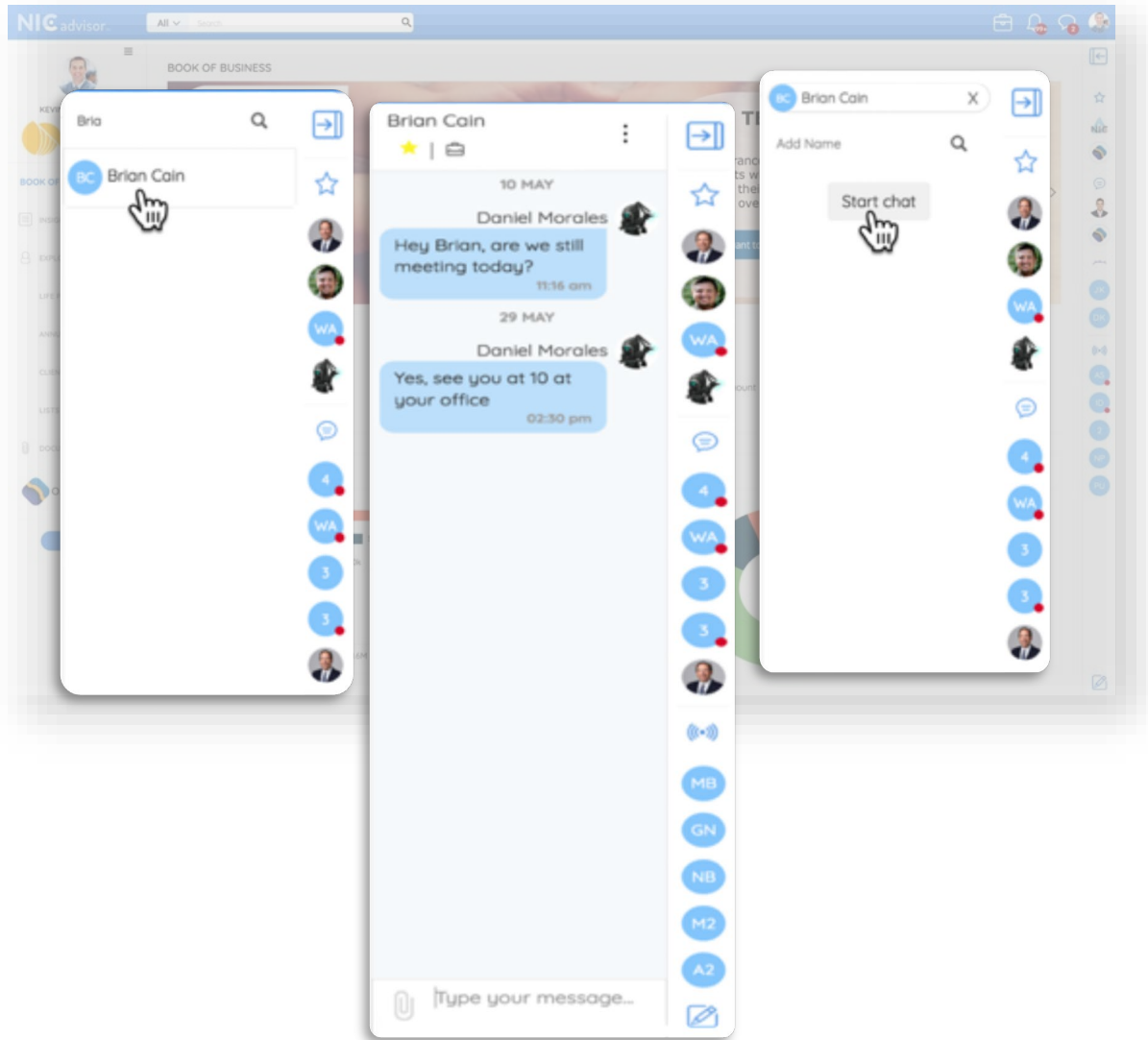
SALES & CLIENT ENGAGEMENT OPPORTUNITIES

The screenshot displays the NIC advisor interface for user Kevin D. Johnson. The dashboard is divided into several sections:

- Top Summary:** Total Annual Premium: \$10,247,739; Total Cash Value: \$50,944,438; Total Net Death Benefit Amount: \$792,563,543; Total In Force Policies: 393.
- SALES AND SERVICE OPPORTUNITIES (highlighted with a red box):** A filter panel with dropdowns for Vendor (ALL CARRIERS) and Product (Indexed UL), and date pickers for Effective Date, Term Conv Expiry Date, Maturity Date, and Insured Birth Date. A "CREATE LIST" button is at the bottom.
- MATURITY OPPORTUNITIES:** A list of policies maturing in the next 90, 120, 180, and 360 days, with counts of 1, 1, 2, and 4 respectively.
- RENEWAL OPPORTUNITIES:** Shows 50 Term Policies (Over 10 years old).
- CONVERSION OPPORTUNITIES:** Shows one opportunity for John Hancock.

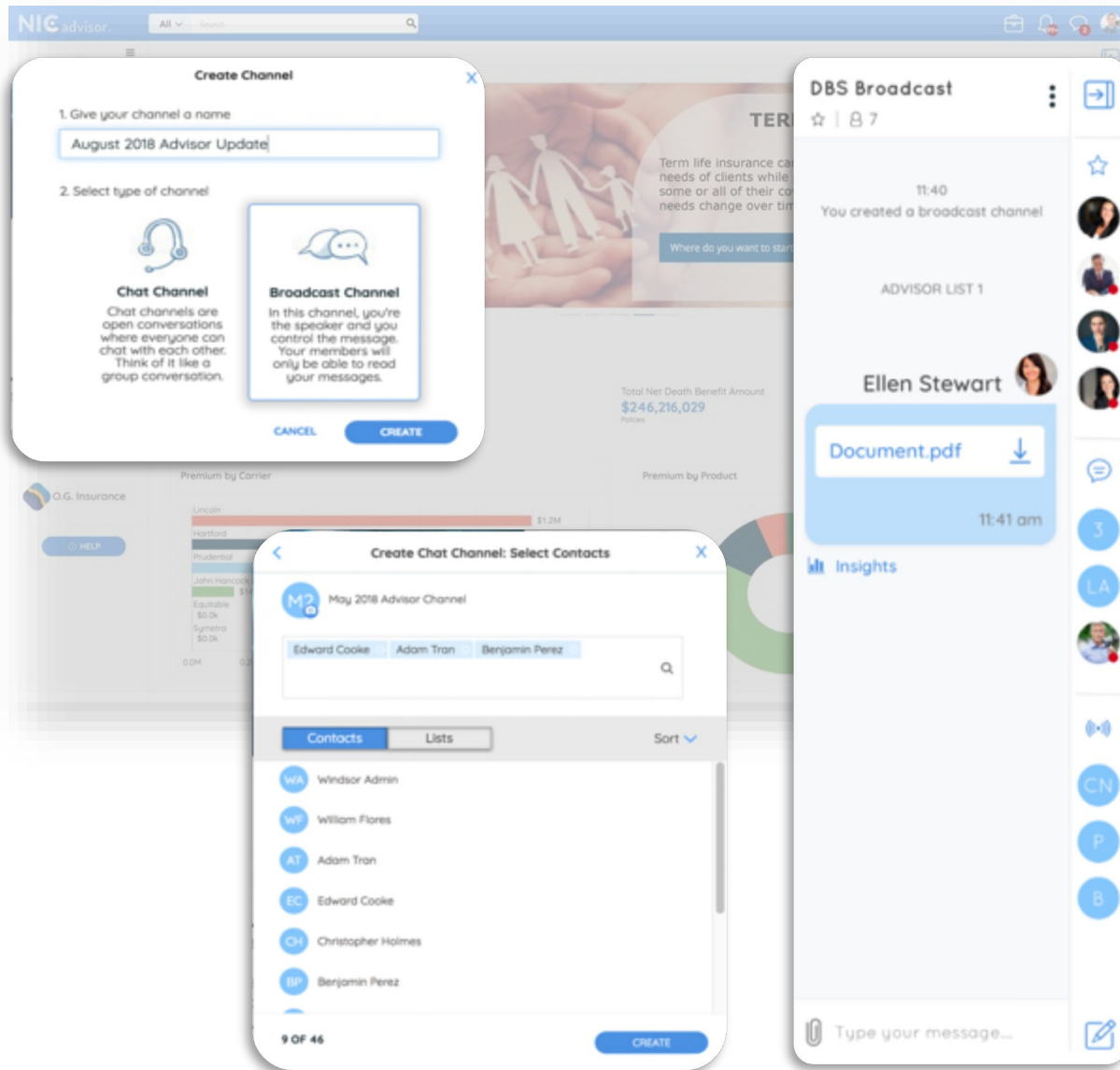
- ❖ Agents are able to access Sales and Client Engagement Opportunities
- ❖ Communicate those sales & service opportunities to your Agents

DIRECT MESSAGING



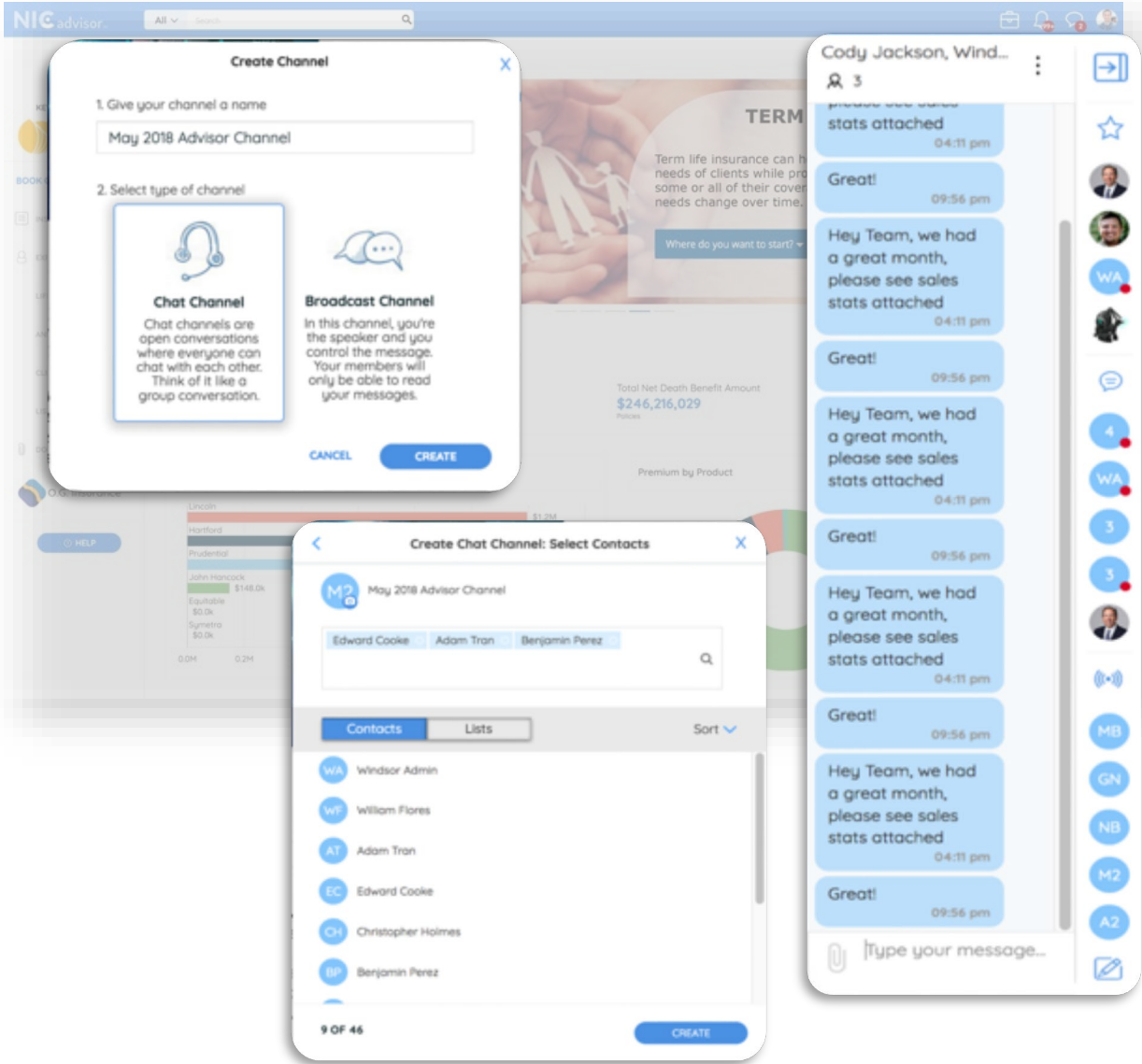
- ❖ Direct Messaging enables one-to-one conversations between you and your Agents

BROADCASTS



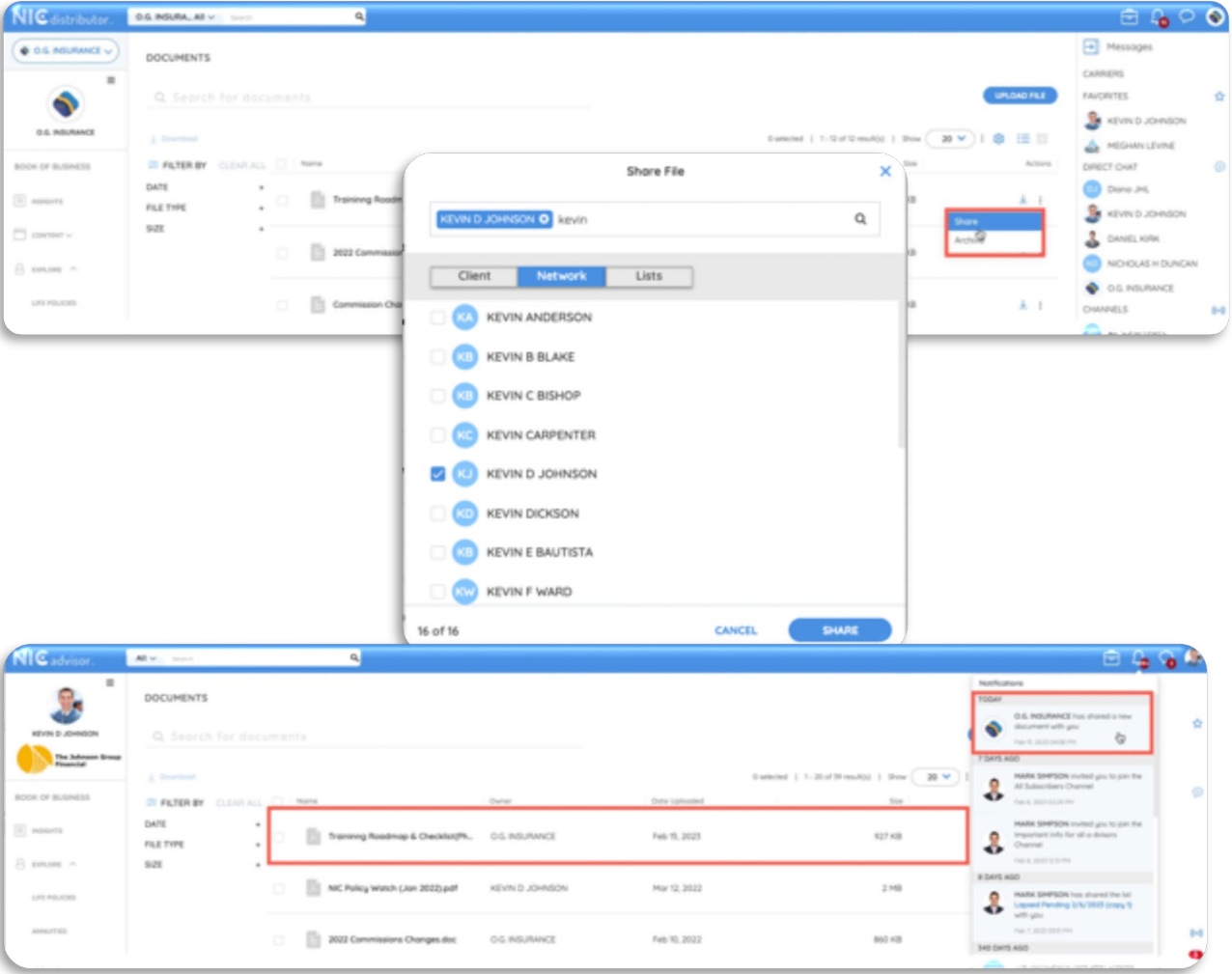
- ❖ Broadcasts enables you to send messages to multiple Agents (one-to-many)

GROUP CHAT



❖ Group Chat supports conversations with multiple NIC users

DOCUMENT SHARING



- ❖ 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



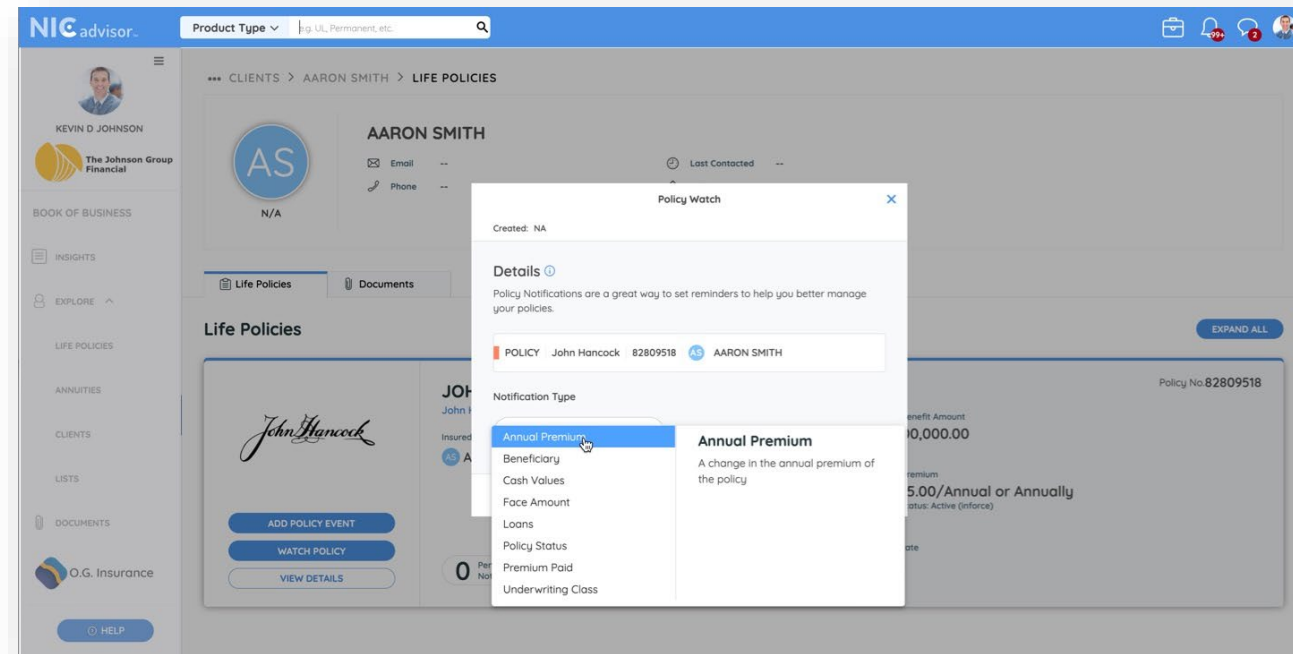
Policy Services



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



- ❖ 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

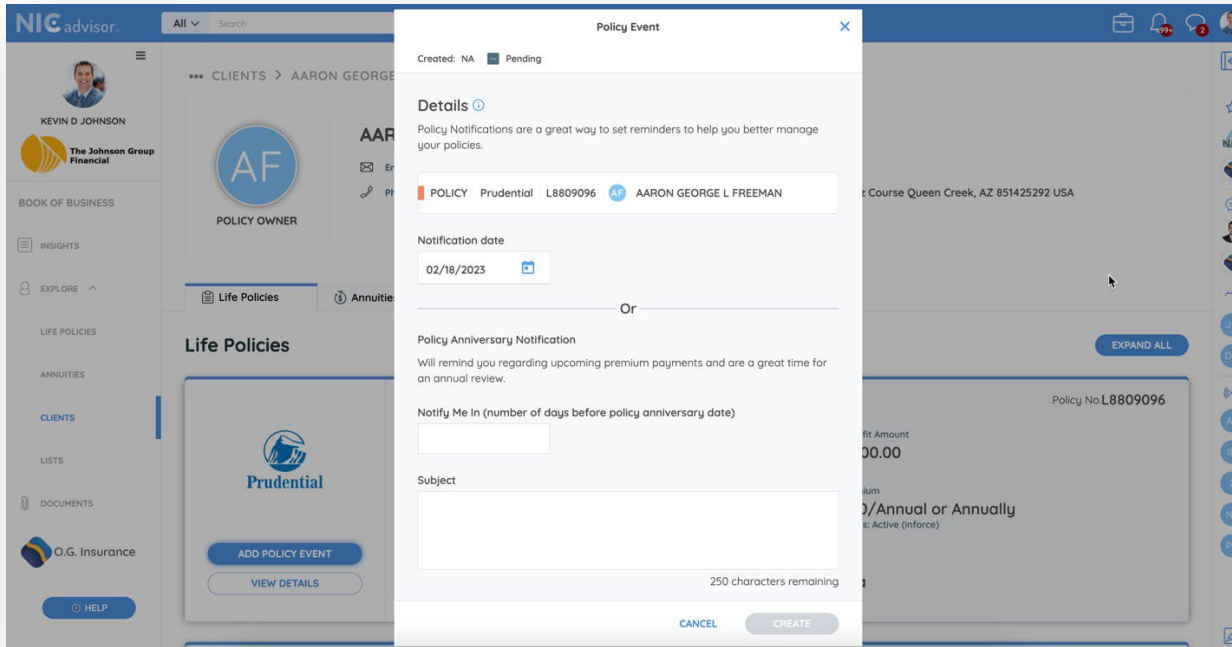
POLICY WATCH

The screenshot displays the 'NIC advisor' interface for 'POLICY WATCH'. The user is Kevin D. Johnson, associated with The Johnson Group Financial. The interface includes a search bar for 'Product Type' (e.g., UL, Permanent, etc.) and a navigation menu with options like 'Life Policies' and 'Notifications'. A table of policy events is shown, with columns for 'Policy No.', 'Carrier', 'Policy Owner', 'Type', 'Created Date', 'Notification Date', and 'Policy Watch Event Details'. The table lists 10 notifications for policy L9662490, all from Prudential, owned by Pedro Rivera, dated March 15, 2022. The event details describe various changes such as 'Annual Premium', 'Beneficiary', 'Cash Value', 'Face Amount', 'Loans', 'Policy Status', 'Premium Paid', and 'Underwriting Class'.

	Policy No.	Carrier	Policy Owner	Type	Created Date	Notification Date	Policy Watch Event Details
TYPE							
<input type="checkbox"/> Annual Premium (1)	L9662490	Prudential	PEDRO RIVERA	Cash Value	Mar 15, 2022	Mar 15, 2022	changed from \$100.00 to \$150.00
<input type="checkbox"/> Beneficiary (1)	L9662490	Prudential	PEDRO RIVERA	Premium Paid	Mar 15, 2022	Mar 15, 2022	changed from \$100.00 to \$125.00
<input type="checkbox"/> Cash Value (3)	L9662490	Prudential	PEDRO RIVERA	Underwriting Class	Mar 15, 2022	Mar 15, 2022	changed from \$100.00 to \$125.00
<input type="checkbox"/> Face Amount (1)	L9662490	Prudential	PEDRO RIVERA	Policy Status	Mar 15, 2022	Mar 15, 2022	changed from \$100.00 to \$125.00
<input type="checkbox"/> Loans (1)	L9662490	Prudential	PEDRO RIVERA	Loans	Mar 15, 2022	Mar 15, 2022	changed from \$100.00 to \$125.00
<input type="checkbox"/> Policy Status (1)	L9662490	Prudential	PEDRO RIVERA	Loans	Mar 15, 2022	Mar 15, 2022	changed from \$100.00 to \$125.00
<input type="checkbox"/> Premium Paid (1)	L9662490	Prudential	PEDRO RIVERA	Beneficiary	Mar 15, 2022	Mar 15, 2022	changed from \$100.00 to \$125.00
<input type="checkbox"/> Underwriting Class (1)	L9662490	Prudential	PEDRO RIVERA	Face Amount	Mar 15, 2022	Mar 15, 2022	changed from \$100.00 to \$125.00
DATE							
<input type="radio"/> Last 7 days	L9662490	Prudential	PEDRO RIVERA	Annual Premium	Mar 15, 2022	Mar 15, 2022	changed from \$100.00 to \$125.00
<input type="radio"/> Last 14 days	L9662490	Prudential	PEDRO RIVERA	Annual Premium	Mar 15, 2022	Mar 15, 2022	changed from \$100.00 to \$125.00
<input type="radio"/> Last 30 days	L9662490	Prudential	PEDRO RIVERA	Cash Value	Mar 15, 2022	Mar 15, 2022	changed from \$100.00 to \$102.00
<input type="radio"/> Last 90 days	L9662490	Prudential	PEDRO RIVERA	Cash Value	Mar 15, 2022	Mar 15, 2022	changed from \$100.00 to \$101.00
<input type="radio"/> Custom Date Range	L9662490	Prudential	PEDRO RIVERA	Cash Value	Mar 15, 2022	Mar 15, 2022	changed from \$100.00 to \$101.00
<input type="checkbox"/>	L9662490	Prudential	PEDRO RIVERA	Cash Value	Mar 15, 2022	Mar 15, 2022	changed from \$100.00 to \$101.00

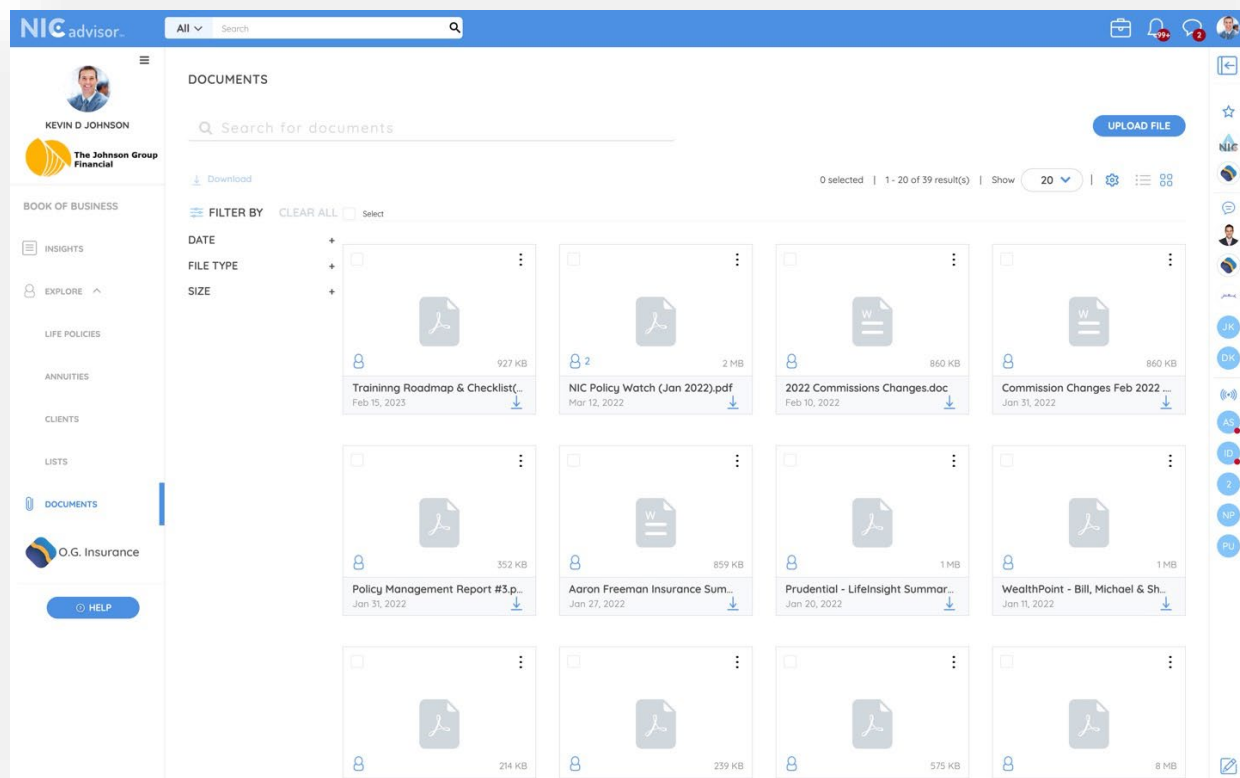
❖ Manage, segment and sort policy change notifications

POLICY EVENTS



- ❖ 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

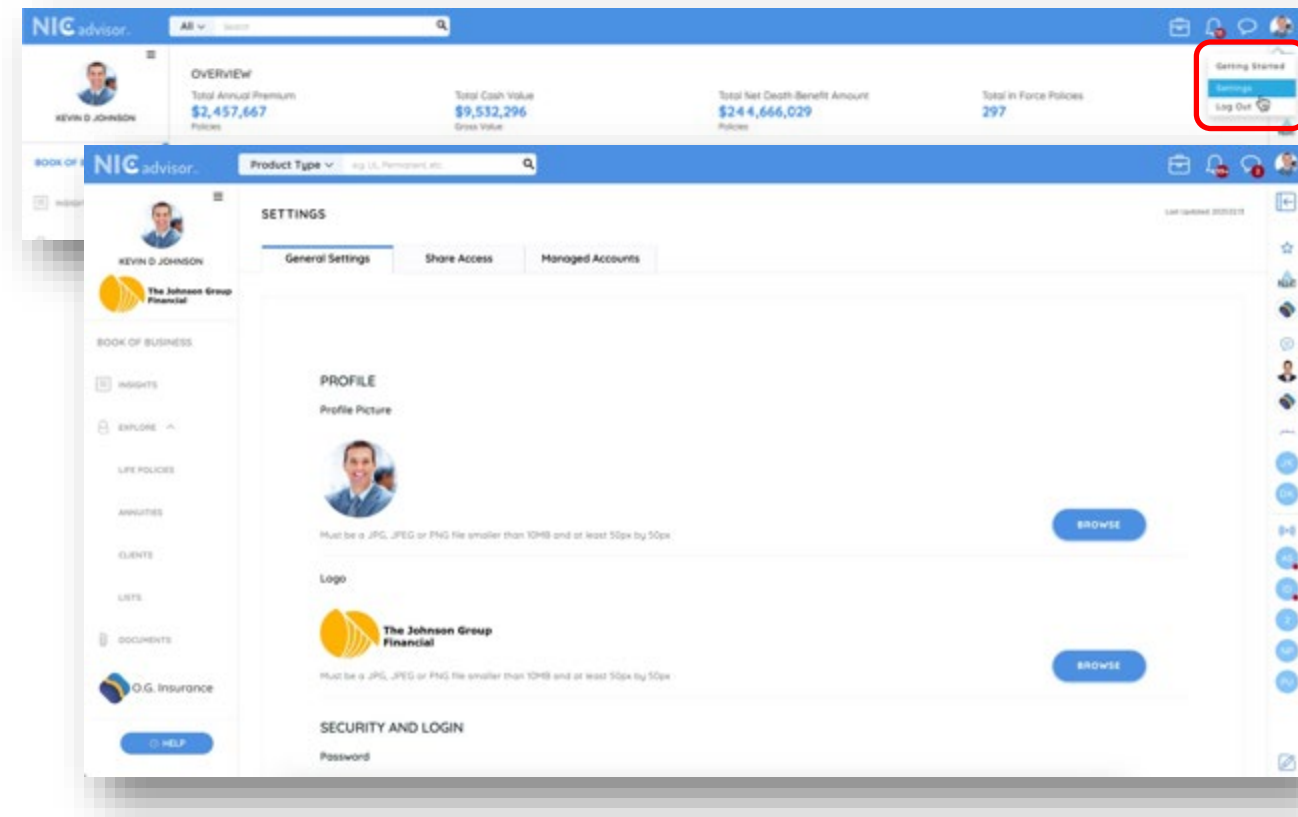
Access for Support Staff



Don't Miss Out on Important Client Engagement Opportunities

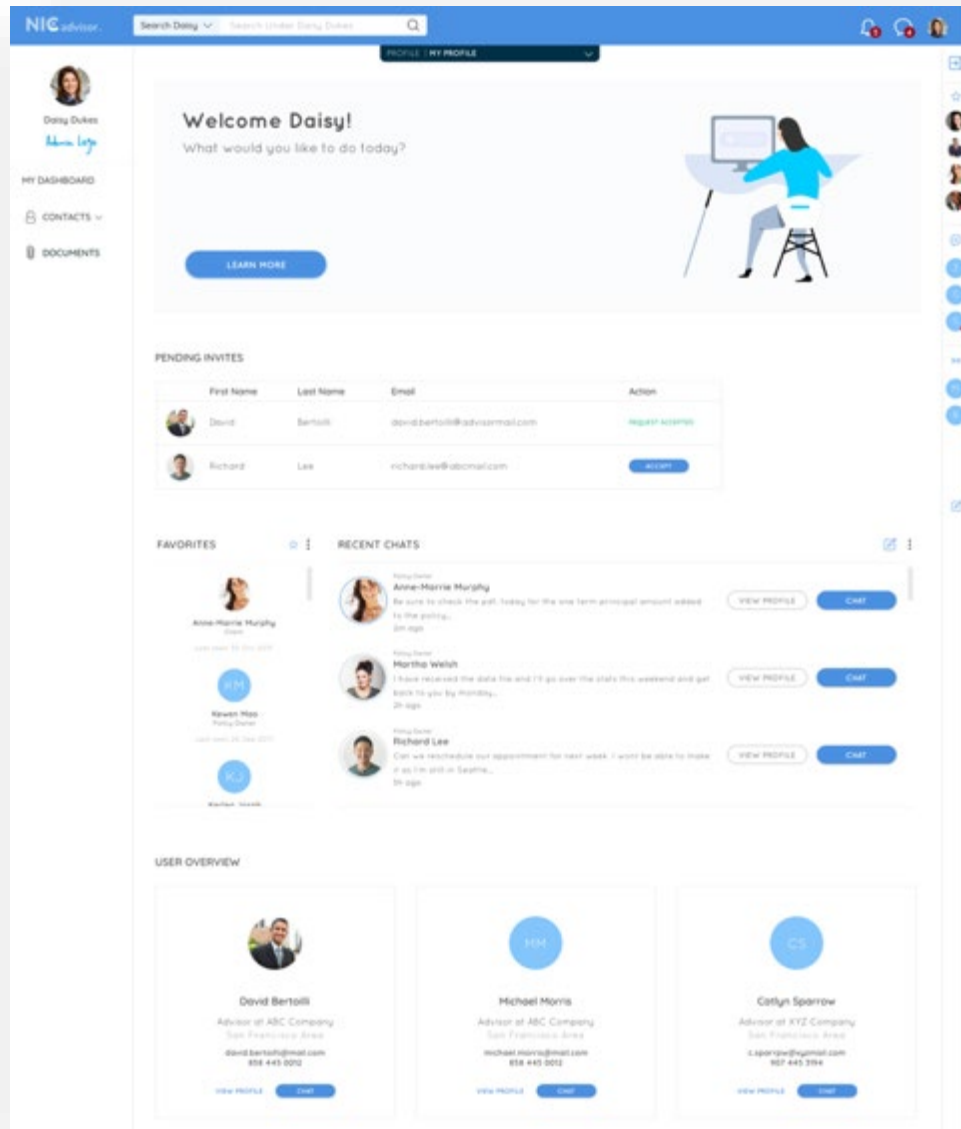
Whether you are monitoring in force policies for important changes (e.g., status changes) or tracking important dates like annual reviews, NIC enables you to keep tabs on your entire in force book.

ADVISOR PROFILE MANAGEMENT



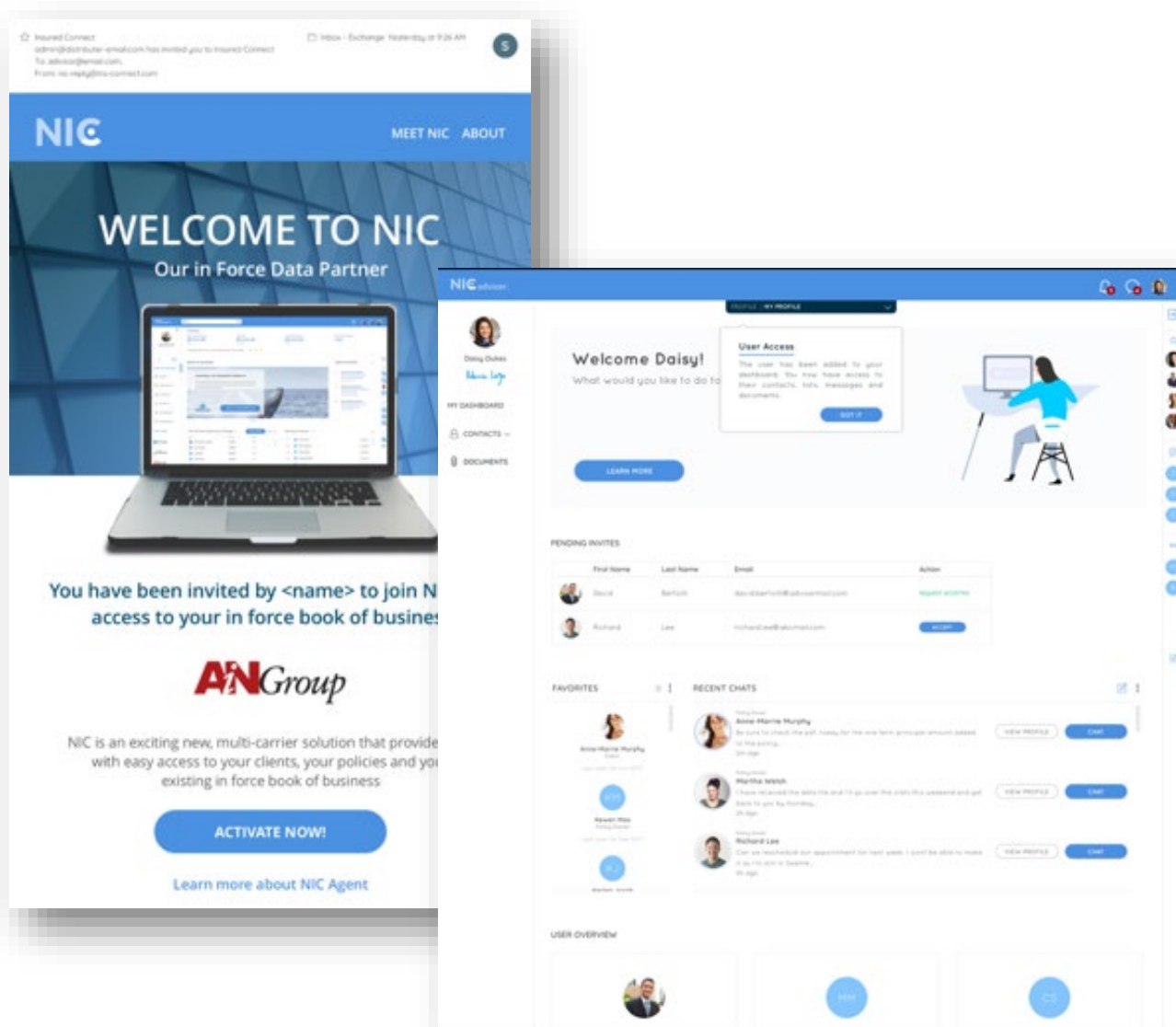
- ❖ Enables advisors to make changes to their profile and manage their preferences:
 - ✓ Upload profile picture
 - ✓ Logo
 - ✓ Update personal & demographic information
 - ✓ Share admin access (on-behalf-of)
 - ✓ View accounts you have access to

SHARING ACCESS TO YOUR DATA



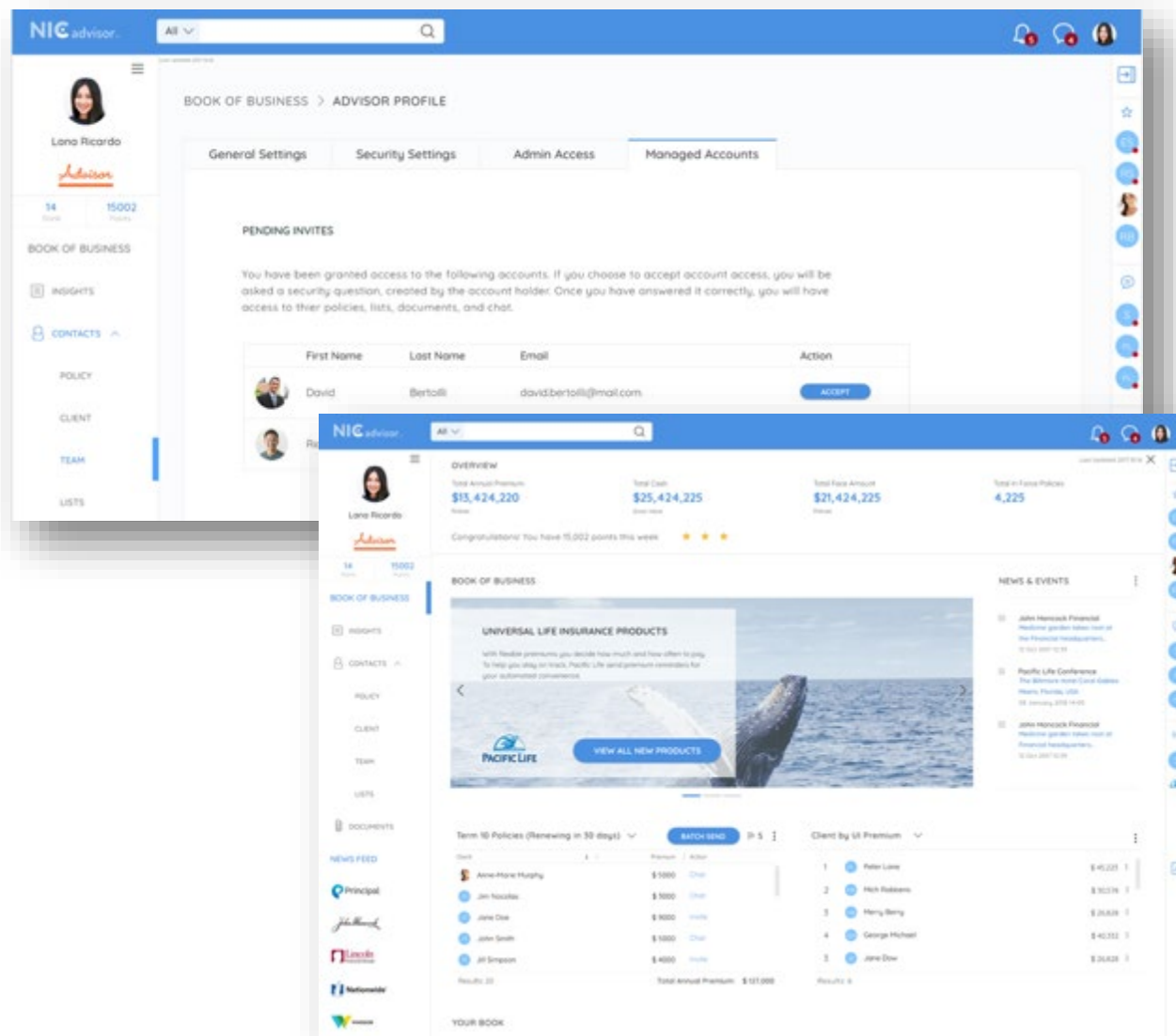
- ❖ Advisor invites other users to help them manage their Book of Business
- ❖ Administrative user's access can be revoked and/or granted again at any time by the Advisor

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

MANAGING PRINCIPAL



- ❖ 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

Additional Programs



Addition programs that are available for an additional subscription

DATA EXTRACTS

ID	Business Name	Address	State	Zip	Country	County	Area	FIPS	MSA	PMSA	Loc	TZ	DST	LAT	LONG	Phone	Tax
1	1 A A S Alliance for A Insurance - Life	126 107th Bellevue	WA	98004	USA	King	425	53033			7600	PST	Y	47.6186	47.60986	-122.204	-122.198 (425) 443-0472
2	2 1st Cal Best Insurance - Life	20812 Ver Los Angel	CA	91364	USA	Los Angel	818	6037			4480	PST	Y	34.1552	34.16623	-118.594	-118.587 (818) 340-8002
3	3 1ST HEALTH Insurance - Life	16542 Ver San Ferna	CA	91436	USA	Los Angel	818	6037			34.1498	34.15765	EST	34.1498	34.15765	-118.496	-118.494 (818) 448-4557
4	4 1st Secur We are an Insurance - Life	Highway E Washingt	IN	47501	USA	Davies	812	18027				EST	Y	38.6427	39.69838	-87.1768	-86.1421 (812) 875-3200
5	5 1ST SOFI INSURANCE - Life	5009 Dobb Tarzana	CA	91356	USA	Los Angel	818	6037			4480	PST	Y	34.1585	34.16051	-118.549	-118.531 (818) 535-7434
6	6 21st Century Insuran Insurance - Life	2500 N Ric Appleton	WI	54911	USA	Outagam	920	55087	460			CST	Y	44.2816	44.28426	-88.3849	-88.4156 (920) 380-7056
7	7 3M Financial Service Insurance - Life	5055 E Bro Tucson	AZ	85711	USA	Pima	520	4019	8520			MST	N	32.2154	32.22189	-110.885	-110.885 (520) 290-1866
8	4 Insuranceagents.co Insurance - Life	5105 Woo Centrevill	VA	20120	USA	Fairfax	703	51059			8840	EST	Y	38.853	38.86635	-77.4732	-77.4436 (888) 451-9955
9	9 A & A And Associate Insurance - Life	913 Grovel Midlothia	VA	23114	USA	Chesterfi	804	51041	6760			EST	Y	37.4855	37.50336	-77.6567	-77.615 (804) 594-3570
10	10 A & A Insurance - Life	2620 Cent Shrevepoi	LA	71104	USA	Caddo	318	22017	7680			CST	Y	32.4855	32.48649	-93.7335	-93.732 (318) 221-8200
11	11 A & B Tax Service & Insurance - Life	501 Glend Galax	VA	24333	USA	Galax City	276	51640				EST	Y	36.6484	36.67181	-80.9203	-80.9182 (276) 236-2297
12	12 A & J Insurance Ager Insurance - Life	1381 E Las San Gabri	CA	91776	USA	Los Angel	626	6037			4480	PST	Y	34.0897	34.10362	-118.096	-118.078 (626) 286-3410
13	13 A & T Insurance - Life	18404 Us Apple Val	CA	92307	USA	San Berna	760	6071			6780	PST	Y	34.5744	34.53982	-117.115	-117.261 (760) 946-1109
14	14 A & Tee Insurance A Insurance - Life	334 46th A Nashville	TN	37209	USA	Davidson	615	47037	5360			CST	Y	36.1578	36.1513	-86.9241	-86.842 (615) 385-2700
15	15 A A A Laclede Insurance - Life	3218 Lacle St Louis	MO	63143	USA	Saint Loui	314	21819	7040			CST	Y	38.6118	38.60503	-90.3192	-90.3318 (314) 646-6000
16	16 A A Independent Ins Insurance - Life	4116 Mck Texarkana	TX	75503	USA	Bowie	903	48037	8360			CST	Y	33.5173	33.46476	-94.1187	-94.0954 (903) 793-3009
17	17 A A Inland Builders Insurance - Life	1700 E Ash Goldsbor	NC	27530	USA	Wayne	919	37191	2980			EST	Y	35.4141	35.37838	-78.0215	-77.9707 (919) 734-7710
18	18 A A Insurance Cente Insurance - Life	1900 Garth Baytown	TX	77520	USA	Harris	281	48201		3360		EST	Y	29.7436	29.74557	-94.984	-94.977 (281) 422-9859
19	19 A AAA Agency Insurance - Life	714 E Kalli Lafayette	LA	70508	USA	Lafayette	337	22055	3880			CST	Y	30.1523	30.19831	-92.0308	-92.0029 (337) 289-6883
20	20 A Aaaaaladdin Insur Insurance - Life	12874 US Daide City	FL	33525	USA	Pasco	352	12101	8280			EST	Y	28.3889	28.34448	-82.209	-82.1872 (352) 567-5555
21	22 A Accredited Insuar Insurance - Life	334 E Farn Lafayette	LA	70508	USA	Lafayette	337	22055	3880			CST	Y	30.1523	30.14894	-92.0308	-92.0435 (337) 988-4210
22	23 A Affordable Health Insurance - Life	1398 La Co Port Oran	FL	32129	USA	Volusia	386	12127	2020			EST	Y	29.1418	29.15688	-81.0177	-81.0327 (386) 322-1745
23	24 A Affordable Insuar Insurance - Life	829 West Whiteclan	IN	46194	USA	Johnson	317	18081	3480			EST	Y	39.551	39.56188	-86.0995	-86.0982 (317) 535-8773
24	25 A Ammermuller and Insurance - Life	766 Shrew Tinton Fal	NJ	7724	USA	Monmouth	732	34025			5190	EST	Y	40.2996	40.32081	-74.074	-74.0728 (732) 345-6303
25	26 A Angerer Insurance Insurance - Life	3050 S Col Mesa	AZ	85210	USA	Mariocopa	480	4013	6200			MST	N	33.3901	33.35969	-111.842	-111.842 (480) 892-7900
26	27 A Auto Insurance W Insurance - Life	800 Park A West Palm	FL	33403	USA	Palm Bea	561	12099	8960			EST	Y	26.8027	26.79856	-80.0791	-80.0687 (561) 844-7283
27	28 A B C Associated Bus Insurance - Life	588 New Jersey Cit	NJ	7306	USA	Hudson	201	34017			3640	EST	Y	40.7351	40.73232	-74.0685	-74.057 (201) 222-1115
28	29 A B Carballosa Ins Ag Insurance - Life	4622 Holly Hollywoo	FL	33021	USA	Broward	954	12011			2680	EST	Y	26.0228	26.0103	-80.1869	-80.19 (954) 987-0100
29	30 A Beesure Insurance Insurance - Life	804 Orland Bradentor	FL	34207	USA	Manatee	941	12081	7510			EST	Y	27.4402	27.45845	-82.5786	-82.5688 (941) 739-5006
30	31 A Berry Insurance - Life	1050 New West Hart	CT	6110	USA	Hartford	860	9003	3280			EST	Y	41.7325	41.7306	-72.7334	-72.7262 (860) 233-3119

- ❖ 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

	Contract No.	Owner Name	Product Name	Type	Premium Since Inception	Initial Premium Paid	Surrender Chart
LOCATION (STATE)	71277565	JORGE DELGADO	Fixed Indexed Annuity	Fixed Indexed Annuity	\$51,640.55	\$51,640.55	Oct 8, 2025
TYPE	70681551	JOE L VALDEZ	Fixed Annuity	Fixed Annuity	\$26,423.69	\$26,423.69	Oct 27, 2018
CARRIER	70719981	SETH R HOFFMAN	Fixed Annuity	Fixed Annuity	\$50,000.00	\$50,000.00	Feb 10, 2019
CONTRACT STATUS	71360843	AARON MORALES	Fixed Indexed Annuity	Fixed Indexed Annuity	\$15,006.98	\$15,006.98	Sep 13, 2026
ANNUAL PREMIUM	70141999	AARON GEORGE L FREE	Fixed Indexed Annuity	Fixed Indexed Annuity	\$16,400.00	\$10,000.00	
SURRENDER VALUE	71346697	AARON GEORGE L FREE	Fixed Indexed Annuity	Fixed Indexed Annuity	\$28,439.44	\$28,439.44	May 24, 2026
ACCUMULATION VALUE	71176479	STEPHANIE HERNANDEZ	Fixed Indexed Annuity	Fixed Indexed Annuity	\$64,931.88	\$64,931.88	Aug 18, 2024
	71172480	DOMINIQUE L MCKEE	Fixed Indexed Annuity	Fixed Indexed Annuity	\$51,114.28	\$51,114.28	Aug 11, 2021
	71288685	CHRISTOPHER O GONZA	Fixed Indexed Annuity	Fixed Indexed Annuity	\$150,000.00	\$150,000.00	Dec 9, 2022
	71248544	MITCHELL F REYES	Fixed Indexed Annuity	Fixed Indexed Annuity	\$31,967.12	\$31,967.12	Jun 24, 2022
	71511751	SHARON J HARRIS	Fixed Indexed Annuity	Fixed Indexed Annuity	\$165,739.30	\$165,739.30	Aug 7, 2028
	70690857	SARA K TATE	Fixed Annuity	Fixed Annuity	\$184,913.78	\$100,000.00	Nov 19, 2015


- ❖ Access to view in force annuity book of business including
 - ✓ data insights
 - ✓ sales opportunities for all of Distributor downline



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

Diana Klisara

 diana.klisara@ins-connect.com

 416.706.4248

 www.meetnic.com

