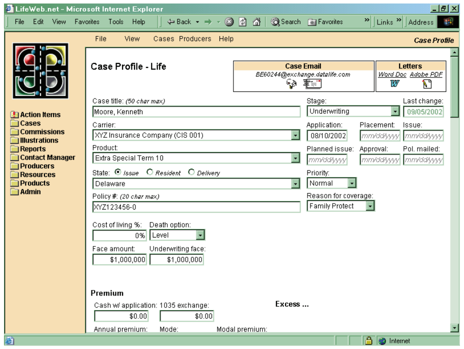
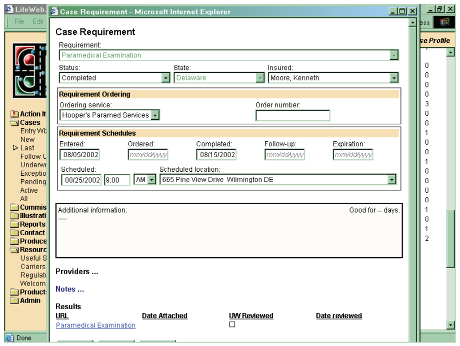
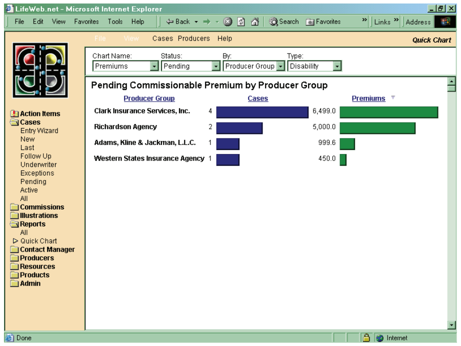
Sample Case Information



Requirement with attached results



Graph of pending DI cases



Data Life Associates ***has been providing creative and collaborative solutions to the life insurance industry for over 40 years.***

We specialize in connecting producers, life insurance carriers, and third-party distribution channels by helping to bring innovative products to market quickly by providing actuarial expertise, illustration support, case management tools, and administration services.

Data Life

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Version 2.1 2009

Lifeweb® Distribution System

Reduce costs, enhance communication, and improve underwriting approval times.

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Lifeweb®

The Lifeweb system was developed to meet the specific needs of companies and their associated distribution channels. This case management system focuses on a high level of automation for the policy issue process to rapidly disseminate and retrieve information. This ultimately improves regulatory compliance, communication, and collaboration with the producers and producer groups. The Lifeweb system seamlessly integrates producers, underwriters, reinsurers, and home office support staff via the web. Lifeweb allows 24x7 access both onshore and offshore.
The system's major components include:

Case Management

The Lifeweb system provides the ability to track life, disability, annuity, and long term care cases from the development of the illustration until the case is issued. During this time the current status of the case is available on-line for access by authorized users.

Medical Requirements

Based upon the individual insured's age, coverage amount, issue state, and proposed underwriting class, medical requirements are automatically assigned to the proposed insured(s) based upon carrier-specific rules. Additional requirements, such as an APS can be entered into the system. These requirements can also be automatically ordered and the results returned to the system for viewing.

Workgroup Requirements

Check list items may be assigned to each case based upon user-defined workgroup rules and are tracked for each case. Each requirement has notes associated with it to provide each member of the team a current status of the case's progress.

Inforce Policy Status & Values

The current status of all the business written, including policy values is available through a link to either the carrier's legacy system or a TPA.

Illustration Integration

The system provides options for using a Data Life developed web-based illustration system or the ability to exchange data with other illustration systems.

Action Items

Action items may be associated with a case, a producer, a client or general items without a specific association. Each action item may be assigned to members of the workgroup or to the producers and assigned a priority.
Based upon rules established by the workgroup, action items or email notes can be automatically generated by the system to reflect changes in the status of a case.

Producer Contract & Licensing

Producer license and contract status is either maintained on the system or may be linked to the carrier's legacy system. The system supports complex reporting hierarchies with separate contracting hierarchies for variable business.

Reports and Graphs

Reports and graphs are available to provide assistance to the support staff as well as to provide management information on workflow, productivity and production.

State-of-the-art System Security

The security in the system has been designed to allow only authorized user access to the data about clients, policies, and producers. Even individual members of the staff can be restricted from sensitive data such as commission information and confidential client information.
The data security involves full encryption of the data stream using Secure Sockets Layer (SSL), so that there is no vulnerability to data-packet interception.