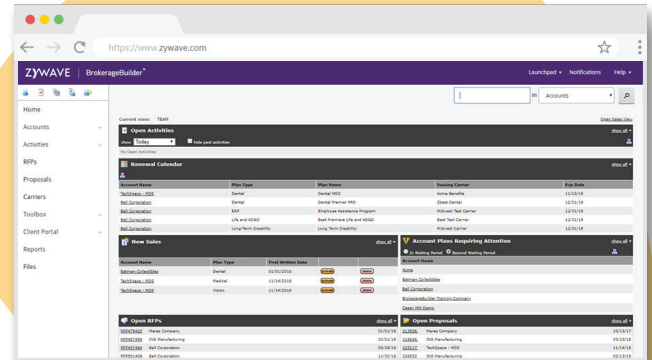


BrokerageBuilder for TPAs and GAs

Organize Your Client/Prospect Account Data and Build Proposals with the Industry Leading Employee Benefits Management System

As a benefits provider, account management, organization, and responsiveness are critical. Efficiently managing renewals, keeping employer and plan data organized, and responding quickly to claims or service issues help to maximize client satisfaction, retention, and profitability.

BrokerageBuilder streamlines all of these administrative tasks and makes sure everyone is on the same page when claims or service issues arise. This ensures that internal communication, client service, and responsiveness are at the highest level possible.



Effectively and Efficiently Manage Sales and Service Workflows

Easy Access to Plan Documentation & Commission Tracking

Track commissions with ease and instantly access plan documentation needed to provide proposals and service clients - all within the same system that stores your client and prospect data.

Standardized RFPs & Pipeline Management

Don't waste valuable time building RFPs and proposals from scratch. BrokerageBuilder standardizes the RFP process in a way that's simple and efficient for service teams. Sales teams can utilize the pipeline management functionality to increase visibility and forecast incoming revenue with ease.

Third Party Integrations

BrokerageBuilder is not a walled garden. Integrations with Microsoft Office apps extend information through your technology ecosystem, eliminating the need for you to send or log the same information multiple times.