

AgencyEDGE[™]



AgencyEDGE simplifies licensing management and helps you ensure producers are authorized to sell:

- Intuitive interface enables fast and easy online electronic licensing
- Provides agency administrator oversight into agent credentials
- Accurate producer data decreases submission errors
- Experts help you stay on top of ever-changing regulatory requirements
- Simple monthly billing

Expedite insurance licensing and renewals.

Remembering to renew your producer's licenses may not be first thing on your mind. Answering client questions, getting rate quotes, submitting applications and handling premium payments keep you from making sure your producers are fully authorized to sell. Wouldn't it make more sense for your agency to spend more time selling, and less time managing licenses?

License Applications and Renewals Made Easy

AgencyEDGE is an online service that provides a single-source platform where you can quickly perform licensing transactions in any jurisdiction, and easily ensure that your agents are authorized to sell.

While you complete our interview-style questionnaire, your agents' applications are seamlessly completed behind the scenes. Direct access to the National Producer Database (PDB) enables you to automatically populate your applications with the most up-to-date information available.

Having the most current information means you can ensure your producers have the proper credentials. Without these proper credentials, your agency risks expired licenses, delays in policy issuance and withheld commission payments.

Proactive Management

With the upcoming introduction of producer connections, AgencyEDGE will provide timely reminders of upcoming renewals and education requirements. Convenient email notifications provide you with

advanced insight when your producers' applications change status with the state. If a transaction error occurs, AgencyEDGE provides a detailed explanation and instructions, and holds the transaction in a queue so that you can fix errors in advance rather than needlessly paying the state for declined transactions.

You can rely on knowledgeable customer service representatives to assist you with transactions, provide you with informed answers to your questions and update you when regulatory requirements change. Streamlined payment processing allows you to pay all state fees on one convenient monthly statement, rather than issuing 50 different payments.

Get Anytime, Anywhere Access

AgencyEDGE delivers faster compliance processing without an expensive software investment. It combines access to PDB data with electronic regulatory processes in a single integrated service, including:

- 24/7 online access
- No implementation costs or requirements
- Electronic license application, renewal and CE tracking

Get Even More with a Premium Subscription

An upgrade subscription helps you ensure that all of your producer and agency licenses are up to date. A premium subscription allows you to:

- View your agency licenses
- Receive license updates automatically
- Hide licenses you don't wish to track
- Quickly identify all renewable licenses
- Configure and receive license renewal reminders

Strengthen Your Agency-Producer Connections

If keeping up with your agency licensing is tough, keeping on top of your agents' licensing is even tougher. That's why AgencyEDGE will soon be connecting you with your individual agents. Strong agency-producer connections can help your agency stay in compliance and generate more revenue:

- Receive timely reminders of upcoming renewals
- Ensure commissions are paid
- Track and manage license and education information
- Track and manage carrier relationships

Get Started Today

Getting started is easy. In less than two minutes, you can subscribe to the service, validate licenses and ensure authorization to sell. If you're ready to get started with AgencyEDGE, Vertafore can help you get up and running quickly and smoothly.

For more information about how to grow your business with AgencyEDGE, contact your Vertafore Account Manager at 800.444.4813 or visit vertafore.com.

The screenshot displays the AgencyEDGE dashboard. At the top, the Vertafore logo is on the left, and user information 'Dane Sprecher Agency | Mr. Dane Sprecher' is on the right. A navigation bar contains 'My Network', 'Transactions', and 'Administration'. The main header reads 'AgencyEDGE'. Below this, there are two columns: 'Quick Links' with a list of actions like 'View Agency Licenses', 'Apply for a License', 'Renew a License', 'Manage Affiliations', 'License Application Status', 'License Renewal Status', and 'Lookup CE Transcript'; and 'Help & How-tos' with video thumbnails for 'Getting Started with AgencyEDGE', 'Applying for a License', 'Renewing a License', and 'Checking License Application Status'. A 'More Help' button is also present. Below the main content, there are two sections: 'Welcome to AgencyEDGE!' with a list of tasks such as 'Watch our Getting Started video', 'Create new accounts for anyone at your Agency...', and 'Review recent Regulatory Notices'; and 'Regulatory Notices' which states 'There are no recent notices.' At the bottom, a footer contains links for Home, Help & How-Tos, News Releases, State Information, NAIC Information, New_FCRA, and Contact Us.

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The Vertafore Agency Platform™ is a comprehensive cloud-based solution that provides the capabilities independent insurance agencies need today—and for the future. It provides anywhere, anytime access on any device, simplifies transactions, and improves service to customers. For more information on how a modern agency platform can help your agency adapt to the future, contact us at 800.444.4813 or visit vertafore.com/platform.



Vertafore delivers software and services that transform the business of insurance. Unique to the industry, more than 20,000 customers rely on Vertafore to provide integrated technology that connects the entire industry with the most complete source of solutions—agency management, rating and connectivity, content management and workflow, research solutions and producer lifecycle management—so their businesses run better and are more profitable. For more information about Vertafore, please visit vertafore.com.



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