



**They count on you.
You can count on us.**

It's our mission to provide exceptional service and powerful insurance technology so you can focus on what matters to you—people.

- Focusing on our customers
- Delivering results that make a difference
- Demanding operational excellence

You're in good company.

We serve more insurance industry customers than anybody else.

118,527
Management
System Users

39,354
Benefits
Users

85,071
Workflow
Users

20,000
Agencies

477
MGAs

1,000
Carriers

500,000
Insurance
Professionals

23
State
Governments

50+
Association
Partnerships

48 of the top 100
brokers partner with Vertafore for workflow management.

50% of industry transactions
for producer compliance are handled by Sircon.

67 of the top 100
brokers partner with Vertafore for an agency
management system.

Solutions for the entire distribution channel.

Insured/Consumers
Agencies/Brokers
States/Regulators
Carriers/MGAs



Rating & Connectivity



Content Management
& Workflow



Data & Analytics



Credentialing &
Compliance



Management Systems



Insurance Knowledge Base

Why Vertafore? Partner over Vendor

We believe that a partner rather than a vendor will be a greater value over the long term. A one size fits all approach no longer works.

Innovation & Architecture

- Open & Reusable Frameworks
- HA Cloud Operations
- API & Developer Ecosystem
- Innovate with Mobile & Web
- Data Access, Analytics & Visualization
- Browser based, open architecture

The Vertafore Way

- Bias to action
- Win together
- Show up curious
- Say it; do it
- Customer success is our success

Approach to Partnerships

Orange Partner Program

- Microsoft
- DocuSign
- Salesforce
- Highcharts
- Amazon – AWS
- Guidewire
- And more

Summary

- We believe we have the right technology
- We believe we have the most responsive support and services
- We will provide the best relationship now and into the future

Agency product vision

Vertafore Agency Platform

Seamless experience across platform

Improved scalability across your business

Integrate with internal and 3rd-party solutions

Streamlining carrier connections

Getting you closer to your customers

Delivering data and insights

Driving process efficiency

Strengthen the Core

Robust support across all agency operations

Enhanced security and business recovery

Industry compliant