

## Vertafore and AgencyZoom Acquisition FAQ

### **Who is Vertafore?**

As North America's InsurTech leader for more than 50 years, Vertafore is modernizing and simplifying insurance distribution so that our customers can focus on what matters most: people. Vertafore's solutions provide end-to-end connectivity, improve the client and agent experience, unlock the power of data, and streamline essential workflows to drive efficiency, productivity, and profitability for independent agencies and carriers. For more information about Vertafore, visit [www.vertafore.com](http://www.vertafore.com).

### **Who is AgencyZoom?**

AgencyZoom is a Columbus, OH based InsurTech company. Designed to grow your book-of-business, AgencyZoom provides insurance agents with powerful sales analytics and customer engagement automation. AgencyZoom solutions help you manage leads with ease, oversee sales in real-time, and better track monthly goals. The robust automation will drive retention and give customers a fuller experience with personalized onboarding, check-ins, renewal reminders, and google reviews for every policy sold – all while keeping you laser-focused on sales. For more information about AgencyZoom, visit [www.agencyzoom.com](http://www.agencyzoom.com).

### **When will the transaction be completed?**

The transaction closed on November 18, 2021.

### **Why did Vertafore acquire AgencyZoom?**

Vertafore is acquiring AgencyZoom because we are dedicated to bringing best-in-class cloud-based solutions to the insurance industry. With existing integrations to Vertafore agency management systems, we are creating an end-to-end sales management and growth platform for agencies of all sizes. AgencyZoom's intuitive solutions improve customer experience, automate engagement, increase retention, and help close leads faster. This acquisition helps us continue to simplify and automate the insurance lifecycle for our customers.

### **How will AgencyZoom software integrate with Vertafore's solutions?**

Vertafore acquiring AgencyZoom aligns with their broader strategy to simplify and automate operations and processes that modernize insurance agencies and the overall industry. With its open architecture, Vertafore has long been committed to supporting independent agencies of all sizes by providing flexibility for agencies to access the right solution for their business.

AgencyZoom's sales automation, pipeline management, and onboarding solutions combined with Vertafore's expansive suite of solutions ensure that customers have access to the technologies that can best modernize their agency operations across the entire customer lifecycle.

AgencyZoom has been one of Vertafore's Orange Partners since 2019, with extensive integrations already in place with QQCatalyst and AMS360. These integrations are some of the most robust of all of AgencyZoom's integrations, and Vertafore is looking forward to quickly leveraging these connections to develop new ways of helping our customers.

Additional product and technology integration strategies between Vertafore and AgencyZoom will begin to be defined as our teams come together through this acquisition.

**What value will Vertafore's acquisition of AgencyZoom provide customers?**

Thousands of insurance agents use AgencyZoom's solutions to better manage their sales leads, pipelines, and customer onboarding – helping them to accelerate business growth and streamline their organization. The connections that already exist between Vertafore and AgencyZoom will only be strengthened and streamlined by this acquisition as we continue to invest in the products.

Additionally, AgencyZoom customers will experience enhanced resources, including strengthened onboarding and training processes, accelerated product development, and access to future innovative solutions and integrations.

**How does this impact current Vertafore and AgencyZoom customers?**

There are no impacts to products and services, billing, ongoing implementation, contacts, or contact methods.

All product integrations will not be impacted.

There are no changes in pricing or contracts for existing customers.

Any future operational or business changes will be communicated to the appropriate customers.

**How will this impact integrations with other agency management systems?**

All integrations will remain accessible, and no changes will be experienced.

**Will this impact AgencyZoom's relationship with captive agencies?**

No impact will be experienced, and both Vertafore and AgencyZoom will continue to service these captive markets.

**Will this impact current AgencyZoom partner relationships?**

Vertafore will continue to support all AgencyZoom partner relationships.

**Will this change anything for AgencyZoom's solutions, including AgencyHR and Pulse?**

No change is occurring related to AgencyZoom's solutions AgencyHR and Pulse. Current customers may continue to utilize the solutions as they are today.

**What is the current pricing for AgencyZoom, and will that change?**

Current pricing for AgencyZoom may be found on their [pricing page](#). At this time, there will be no changes to the existing pricing structure for AgencyZoom.

**Will this change affect the people I am working with at AgencyZoom, such as my account manager?**

No, there are no changes to your account team as a result of the acquisition.

**Who do I contact with additional questions?**

You may reach out to your account team for any further questions you may have.

**How will future information be shared about the acquisition and the integration of AgencyZoom into the Vertafore product platform?**

Future developments will be shared on Vertafore.com, on Vertafore's social networks, through various other marketing channels, and direct communications with our customers.