



Seamlessly integrated ceding carrier replacement data in your Order-Entry System to Support Replacement Automation and Straight-Through-Processing

Decrease Not-In-Good-Order Replacements

1035YellowPages provides access to ceding carriers' detailed replacement contact information and processing requirements by line of business, for thousands of annuity, life, mutual fund, bank, brokerage and pension administrators replacement processing centers.

20+ Years of Historical Information

Search Logic takes the frustration and time out of researching company name changes, mergers and carriers with similar names.

Producers & Distributors Simplify Replacements

Eliminate Replacement follow-ups and delays!

Electronically Fill ACORD 951e

Advisors are able to select the ceding carrier processing center location and prefill the issuing carriers' ACORD 951e or proprietary Replacement eForm with ceding carrier information. Correct ceding information ensures that requests go to the correct ceding carrier replacement processing location, in-good-order, as quickly as possible.

Ceding Carrier eSignature Acceptance and Delivery Rules

Electronic signature requirement triggers for each ceding processing center dynamically drive the eSignature workflow on the exchange, replacement and transfer forms in order entry platforms. When the ceding company requires the forms to be wet signed, an instruction page can be generated to guide the advisor on the workflow to print, have the client wet sign the forms, and upload the wet signed forms as part of the package.

Improve Customer Experience & Eliminate Follow-ups

The policyholder's sales experience and confidence is enhanced when Advisors handle the ceding carrier requirements during the initial sale, eliminating additional follow-ups to:

- ◆ Request ceding carrier proprietary surrender forms
- ◆ Waive conservation
- ◆ Provide additional signatures / guarantees
- ◆ Change partial requests to full withdrawals
- ◆ Call the ceding carrier to initiate the withdrawal
- ◆ Deliver additional required forms

The client will receive their new product as quickly as possible by eliminating ceding carrier NIGO related to replacement requirements and handling all issues at the time of sale.

Increase Sales Opportunities

Advisors will have more time to spend on additional sales by eliminating the time spent researching elusive carriers, going back to clients for requirement follow-ups or replacement NIGO corrections.

Time = Money