## STAY INFORMED, STAY AHEAD



Introducing **OneView™**, a breakthrough solution that empowers agents/advisors with a unified and real-time view of their carrier's order statuses – all in one convenient location.

OneView provides you with the tools you need to monitor, notify, and fix annuity orders seamlessly and in every step of the process.

This comprehensive solution makes it simple and efficient to manage the status of pending annuity orders in real-time. With OneView's streamlined dashboard, you can now easily track orders and quickly make any necessary changes while drastically minimizing calls and emails with carrier support staff.

Say goodbye to complexity, frustration, and anxiety – and hello to increased efficiency, added confidence, and faster cycle times with OneView.

## **FEATURES**

Real-time order tracking at the carrier level

Centralized dashboard simplifies application tracking – across multiple carriers

Innovative user-friendly dashboard enables financial advisors to quickly identify orders that require immediate actions

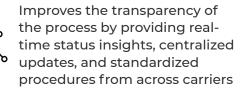
Solution provides all the tools to monitor, notify, and rectify annuity orders

Uses standardized carrier workflow across the industry for improved communication – (such as License,

Appointment and Training Review, Document Review, Suitability, and Funding)

Carriers provide agents with real-time, product-specific feedback, empowering them to address issues immediately

## BENEFITS





Reduces cycle times and NiGOs while boosting efficiencies by minimizing calls, streamlining data, and eliminating inconsistencies



Reduces necessary calls, as well as minimizing call volumes and call lengths



Enables distributors to view their status of suitability while monitoring funding status



Less time spent following up with carriers – and more time spent servicing clients



Reduces admin costs of managing carrier call volumes



## <u>SCHEDULE A DEMO</u>

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