IPIPELINE®

CHARLi™

The Living Intelligence Behind the iPipeline Platform

Intelligence That Connects the Future of Life, Wealth, and Financial Services

CHARLi is the AI engine powering iPipeline's Novera™ platform, turning connected data into intelligent action across life, wealth, and financial services. By delivering embedded insights, automation, and decision support, CHARLi helps organizations accelerate growth, improve efficiency, and drive better business outcomes. The result is faster decisions, streamlined operations, and greater confidence across the financial services value chain.

Shifting Market Forces Today	How CHARLi Positions You for The Future
Customer demand for faster, simpler, more personalized experiences	Delivers contextual insights and guidance that improve speed, responsiveness, and customer engagement
Increasing need to do more with existing resources	Automates manual processes and streamlines workflows to improve efficiency and productivity
Data overload and fragmented systems	Connects data across life, wealth, and financial services to create a unified view and actionable intelligence
Organizations must bring products and services to market faster	Accelerates decision-making and enables teams to act with greater agility
Greater need for accuracy, transparency, and governance	Supports informed decisions through trusted, governed intelligence embedded within existing workflows

The Value of CHARLi

Faster Decisions

Turn vast amounts of data into actionable intelligence, helping teams make informed decisions with confidence.

Greater Operational Efficiency

Reduce manual effort, streamline repetitive tasks, and enable teams to focus on higher-value work.

Enhanced Customer Experiences

Deliver more personalized, responsive interactions across every touchpoint.

Improved Business Agility

Respond more quickly to changing market conditions, customer demands, and growth opportunities.

Better Outcomes Across the Enterprise

Create alignment across distribution, operations, product, and sales teams through connected intelligence.

How CHARLi Works

At the core of the Novera platform, CHARLi continuously transforms information into insight and action.

Cross-Portfolio Data Lake

Brings together intelligence across life, annuities, and financial services.

Intelligent AI Experiences

Natural language queries and Generative AI

Data Interchange Layer

Seamless, secure data sharing across tools

End-to-End Governance

Enterprise-grade security and compliance

Novera™

AI-First Platform for Life, Annuities, and Wealth

Provides organizations greater choice and flexibility in how digital experiences are built, maintained, and scaled across life insurance, annuities, and wealth.

Ready to Learn More? Scan or click the QR code.

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