

SmartOffice Insurance Sync

You deserve automated policy updates. Does your BGA/IMO deliver? Many do, thanks to Insurance Sync.

It's more important than ever to keep pace with rapid technological advances in the insurance industry. Insurance Sync gives your practice an edge in the market, helping you work faster and smarter than your peers.

With Insurance Sync, you can take that competitive advantage to the next level. SmartOffice's Insurance Sync connects you directly to your BGAs so that you can receive the most up-to-date inforce policy and pending case information.

Want to get started?

Call us at 800-777-9188 or email us at crmsales@ebix.com



1 Ebix Way, Johns Creek, GA 30097
www.ebix.com

Leveraging Your BGA Relationship

- **Get Instant Policy Updates**

You don't have to access an advisor portal or wait for a case status e-mail to check on your clients' policies. Just sign in to SmartOffice to see the latest automatic updates from your BGAs.

- **Take Charge of Succession Planning**

If you plan to sell your book, Insurance Sync helps to ensure that all of your policies are accounted for, complete with cash surrender values and other key data.

- **Save Time, Minimize Errors**

No time to update policy data? Insurance Sync saves you hours of manual updates, and minimizes the human error that so often plagues manual data entry.

- **Connect with Your BGAs**

Whether you work with one BGA or several, Insurance Sync has you covered. As long as your BGA uses SmartOffice to manage your clients' policies, you can connect and sync with as many BGAs as you want.

- **Control Your Insurance Data**

Complete access to your insurance data means easily projecting commission revenue, quickly identifying cross-sell opportunities, and providing your clients with consolidated statements.

These are a few forward-thinking agencies who currently participate to help their advisors succeed. Contact us to see if your primary BGA is participating—if they're not, let them know you want **Insurance Sync!**

