

ClientConnect®

The ClientConnect advantage—a self-service portal that connects you with your clients.

Be More to Your Clients

To attract new customers, strengthen existing relationships and increase revenue, you need to differentiate from the other agencies around.

ClientConnect is an economical and efficient way to raise the value of your services and focus on working with your clients as a trusted professional adviser.

ClientConnect self-service portals significantly reduce the time and overhead normally spent maintaining Benefits & HR communications and serves as a virtual risk manager—making your resources available to your clients 24/7 with efficient selfservice solutions.

ClientConnect is a value-added resource that enables you to:

- Launch multiple custom communication client sites quickly
- Access up-to-date risk management information and HR compliance content
- Cross sell your other insurance products easily and effectively

More Integration with BenefitPoint

ClientConnect now seamlessly integrates with BenefitPoint—Vertafore's premier benefits specific agency management system.

This cutting edge integration enables:

- Brokers to instantly import benefit plans from BenefitPoint to ClientConnect
- Employers and employees the ability to review and compare plans—at their convenience

Advise. Quote. Connect.

Contact us today and see firsthand how ClientConnect can help you write more business. Contact us by email at Sales@vertafore.com or call us at 1.800.444.4813.

ClientConnect for P&C— Key Features

Enables Agents to Provide Their Clients with 24/7 Access to:

- Risk Management Guides
- Industry-specific Occupational Safety and OSHA Resources
- Commercial Vehicle & Fleet Management Information
- Crime and Fire Prevention Information
- Emergency Planning & Business Continuation Resources
- U.S. Law & Legal References
- Additional Agency Published Content

ClientConnect for Benefits & HR—Key Features

Providing Employers and Their Employees with Self-Service Access to:

- Links to Insurance Carriers, Benefits Summaries and Plan Details
- Financial Calculators
- State-specific Benefits & HR forms and documents
- Employee Handbook and Policies Content
- Recruiting & Hiring, Health & Wellness, Compliance and Training Resources
- Additional Agency Published Content

Vertafore is the leading provider of software, services and information to the insurance distribution channel, including independent agents, brokers, MGAs, carriers and reinsurers. Vertafore leverages a unique industry presence to deliver meaningful solutions—powerful technology, critical information and robust insights to help organizations effectively respond to business challenges and capture new opportunities. Vertafore solutions are helping more than 15,000 customers and 500,000 end users gain a competitive advantage to accelerate their business performance.

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