



**Vertafore™**

Unleash your potential

# PortalServer

## Factsheet

### About Vertafore

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 have helped more than 15,000 customers and 200,000 users gain competitive advantage to accelerate their business performance.

### Why Vertafore

Vertafore brings together a family of connected technology and information solutions, enabling us to provide clear paths to competitive advantage and growth for all our customers. Vertafore is committed to helping our customers capture opportunities for increasing productivity, efficiency, ROI and growth – unleashing the full potential of their business. Vertafore solutions connect agencies, carriers and MGAs to work together towards a common mission to grow the bottom line and better serve the needs of their clients.

### The Vertafore Team

- Privately-held by JMI Equity and Hellmann & Freidman LLC
- 1100+ Employees
- 43% of employees focus on R&D
- 30% of employees focus on implementation and support
- Deep insurance expertise
- Commitment to client success

## How much would you save if your own experienced business and IT professionals had the tools and technology to roll out lines of business to the Web?

### Opening the Door to New Business Channels

With Portal Server and its advanced XML schema generation, workflow and HTML markup capabilities, you can build and maintain content based on how you do business now. And because you are not tapping outside resources for every step in the process, you gain control of your project timelines without sacrificing quality.

Our tools let your knowledgeable in-house talent build content rapidly and accurately from existing systems. Working smarter, your team can speed new programs to market. The quality of content built by your own expertise will give you the competitive advantage you need.

### Grow Your Business

- Deliver new products to your customers
- Bring existing lines of business online quickly and accurately
- Provide targeted up-selling opportunities to producers
- Capture business metrics

### Ease Business with Producers

**With Portal Server, your producers can easily rate, quote and submit and more...**

- Flexible workflow and rules (BPM)
- Access to reference information
- Real-time third-party data interfaces

### Reduce Cost

**Portal Server tools enable you to save money by leveraging your existing investment in people and systems.**

**Who knows your business better than your own talent?**

- Streamline business workflow through a single point of entry to multiple systems
- Reduce cost of contractors
- Eliminate duplicate entry and increase underwriting accuracy
- Works with new or existing portals

### Speed Time to Market

**With Portal Server, make changes to products and programs in days—not months.**

- Better control project timelines
- Provide real-time data
- Easily integrate with new systems

## Built from the ground up using the latest technology from Microsoft and industry standards

- .NET Framework
- Windows Workflow Foundation (WF)
- Internet Information Server
- XML Schema based

## Security

- Supports claims-based security and Identity Federation

## Third Party Data

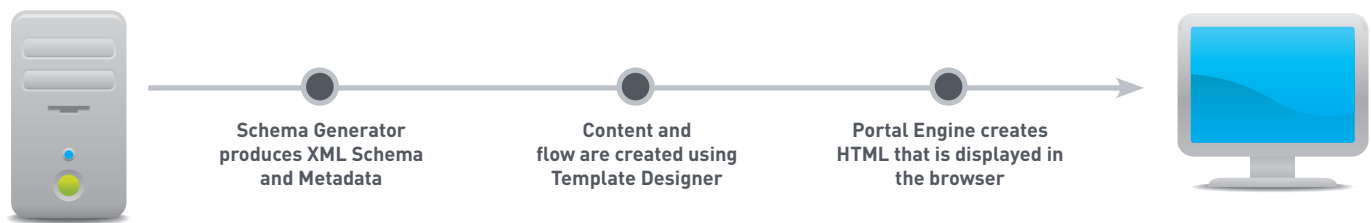
- Uses third-party data feeds such as motor vehicle information, credit scores and property values

## Data Integration

- Data accessed through data providers to data repositories
- Communicate through multiple data mechanisms

## Workflow/Rules (BPM)

- Microsoft Windows Workflow Foundation (WF)
- Portal Server ships with activities facilitating markup generation
- Create custom activities
- Associate rules with activities, such as eligibility, when creating activities



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