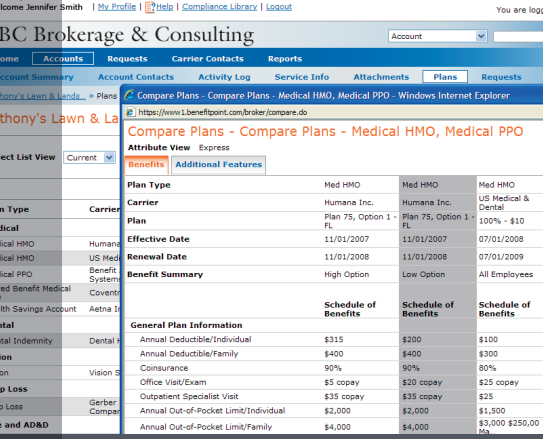




Vertafore™

Unleash your potential

BenefitPoint®



Managing your benefits business just got a little easier. Whether you are a small agency or a large benefits shop, BenefitPoint has a solution that is tailor-made for your brokerage.

BenefitPoint Professional

BenefitPoint Professional is the web-based benefits management solution ideally suited for mid to small brokerages and agencies. With essential management tools, you get all the power without the complexity. With BenefitPoint Professional you can:

- Capture and manage clients, policies, rates and plans effectively and consistently
- Consolidate client information, documents, files and e-mails
- Reduce operational expenses and increase revenue
- Create side by side comparisons of plans and rates

BenefitPoint Enterprise

BenefitPoint Enterprise is the scalable, fully-integrated management system with support for multi-office operations. In addition to the functionality available in the Professional edition, you can:

- Evaluate your business with powerful benchmarking tools
- Institute best practices
- Analyze and audit your business with reporting tools
- Establish transparency and improve compliance in procurement and customer service

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 200,000 end users gain a competitive advantage to accelerate their business performance.

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Vertafore
11831 North Creek Parkway North
Bothell, WA 98011

800.444.4813
salesinfo@vertafore.com
vertafore.com

	BenefitPoint Professional	BenefitPoint Enterprise
Client Management	✓	✓
Policy Management	✓	✓
Activity Log	✓	✓
Operational Reports	✓	✓
Knowledge Base	✓	✓
Revenue Tracking & Management	Optional	✓
Request (RFPs/Renewals)	Optional	✓
Firm Benchmarking	Optional	✓
Reverse Auctions		✓
Aggregate Benchmarking		✓
Mail Merge		✓
Account, Contact, Plan, Service Custom Fields		✓
Executive Reports		✓
Ad Hoc and Custom Reporting		✓
Report Subscriptions		✓
Compliance Library		✓
Questionnaire Library and Scoring		✓
ClientConnect	Add-on module	Add-on module