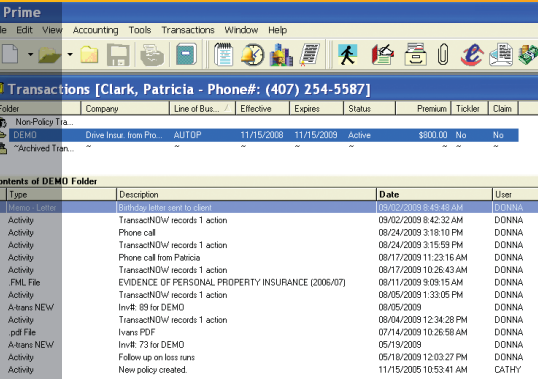




Vertafore™

Unleash your potential

Prime™



Establish and grow your agency with a management system that is easy to use, flexible and affordable. If your agency has one to five employees, Prime delivers the tools you need to automate processes and save time so you can focus on growing your business.

“Prime is the right product at the right price for agencies like ours. It’s flexible, it’s easy to learn and it enables us to sit and sell—and, ultimately, to succeed.”

—Ann Walsh, Principal,
Lloyd Purdy and Company Insurance

Start Writing More Business Today

- Efficiently manage and retrieve client information including policy and personal information—all in one place.
- Send personalized form letters using the included templates, or create your own. The merge fields are already set up for you, making it easy to keep in contact with your customers and prospects.
- Auto-populate the more than 600 available ACORD and other forms, eliminating re-keying information and reducing errors. Certificates of insurance and auto ID cards are also prepared for easy printing.
- Set reminders and alerts for yourself or your staff so you never miss important dates or information.
- Attach files to the client Policy or non-Policy Transaction in the Transaction Center. This allows you to keep all relevant information in one location such as photos of insured property, loss runs or e-mails.
- Import contacts from MS Outlook via contact screens, saving time and eliminating repetitive tasks.

Increase Your Revenue and Productivity

- Make accounting tasks—including year-end taxes—a breeze. Transaction, line-item summary and line-item details are available at the click of a mouse. Prime drastically reduces the time it takes to invoice, write checks, run reports and control your agency finances.
- Easily generate custom reports—such as expiring policies—using sophisticated filters and tools to organize your client data and quickly identify areas of business opportunity.

Easily Connect to Carriers

- Getting accurate and timely information from your carriers is key to keeping your customers happy. Prime facilitates easy communication and policy download.
- Quickly download policy changes directly from your companies—saving you time and reducing errors.

- Service customers with real-time carrier inquiries, quote requests and endorsement processing with TransactNOW, integrated with Prime. And you'll never have to remember logins and passwords to your company websites.
- Prime also integrates with other Vertafore solutions including ProducerPlus, PL Rating and the Prevail Network for more efficiency.
- Manage your clients' claims with complete and accurate claim records.

Choose from Prime In-house or Prime Online

Some agencies require a management system that resides in-house, while others prefer an online system that is hosted offsite. With Prime, you can choose the solution that fits your agency's needs.

- Prime In-house allows you to economically host your data on your agency's servers—enabling you to manage and control access to the data.
- Prime Online provides remote access, daily backups and unlimited storage capability through Vertafore.

The Prime Advantage

- Comprehensive help documents and intuitive interface make it easy-to-learn and use.

“Since we’ve started the automation process, we’ve been able to go from 10 full-time employees to a staff of three, while increasing our business. We are able to manage our accounts and provide outstanding service to our customers, with seven fewer people.”

— Ann Walsh, Principal, Lloyd Purdy and Company

- Multiple training options, including personalized and group training.
- Dedicated technical support experts to answer your questions.
- Automatic and free membership in the AMS Users Group.
- Free subscription to the quarterly *Exchange* newsletter highlighting industry trends and customer successes.
- Monthly Exchange Online newsletter focusing on product news updates.

Affordable Solution for Growing Agencies

Prime is an affordable solution for your growing agency with an emphasis on usability. Central management of your client files, accounting and carrier data will increase your productivity and efficiency, lowering your total cost of ownership. For a personalized demonstration, call 800-444-4813.

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.