



delivers the solution you've been seeking.



How long have you been looking for a life insurance management tool that will give you control over the business, but provide the flexibility needed to deal with Life business? How long have you struggled with managing life insurance commissions through your current broker management system? Keal brings you lifeXP - stop searching.

Life Insurance software seems to be an 'after-thought' when it comes to brokerage software. General Insurance and Life Insurance are managed very differently, yet, from a business management perspective you need to plan, control and direct both businesses effectively.

Reconciling the management of those businesses is a solution Keal has searched for across Canada. We have found a solution that meets those needs, and much more.

Life Insurance is challenging to deal with from a technology perspective, primarily due to the unusual commission structures, flexible contracts and the nature of the policies.

However, working with our development partner, Keal brings to the market lifeXP - a sensible, flexible life insurance manage system that delivers the control you need.

Using the familiar Windows tree view of expanding folders, lifeXP puts most information about customers, policies, representatives, follow ups, and payments just a few clicks away. Automated follows ups make entering information quick and easy. Follow up lists include hyperlinks to the related customer file. Detailed security ensures that options and abilities in the system are limited only to those with the correct permissions. Statistical reporting and sales information is available in real time and can be presented in a variety of formats including bar charts and pie charts. Full management of all insurance company information is available including identification of the company, contacts, categories of products with detailed characteristics, and commission and bonus rates for each product. Within the brokerage, lifeXP provides management of regions and territories, agreements and contracts, summaries and views of clients by agreement and by branch location and the ability to print this information

lifeXP, bring real power to life insurance mangement arena.

lifeXP Fast Fact

- Manage Life, Universal Life, Group, Disability, Investments and Segregated Funds
- Easy sales representative management and reporting
- Sophisticated commission and bonus handling and cash flow management tools
- Clear payment management tools and reporting
- Bilingual application.

Solution Overview

Control Life Business

lifeXP provides excellent reporting tools to provide clear information for status reports and decision making.

Manage Commissions

Built specifically for the life insurance market, lifeXP's commission rate and bonus rate tools address the unique requirements of the life business. The tools are flexible and sensible and make paying commissions and bonus' simple and quick.

Easy File Management

Customer files are simple to understand, update and manage. The simple user interface makes finding information effortless and follows ups are easy to create and track. Simple links to contracts, follow ups, sales representatives and client details speed customer management and optimize the use of your team's time.