



Questions and Answers

Who typically uses Lansare?

- Banks, Broker-Dealers and other firms that sell life and annuity products from multiple carriers.
- Insurance carriers that distribute life and annuities through a multi-channel distribution network.
- Your marketing, sales, operations, compliance and customer service staff.

What does Lansare offer?

We provide a web-based solution called Lansare.Insight that helps our clients analyze, understand, and utilize their life, annuity and related business information to its greatest extent. Lansare.Insight is an on-demand platform offering customized views into your data via research and analytical tools, alerts and reports, dashboards, and data mining capabilities.

Why would I use Lansare.Insight?

If you are concerned about conserving your existing book, expanding customer relationships, simplifying customer service, improving the effectiveness of compliance operations, or conducting ongoing research and analysis on your data, we can help. Lansare.Insight for life & annuities will unlock the value stored away in existing policyholder data, and help you better manage your business.

Can Lansare help us reduce costs associated with our data?

Lansare.Insight is designed to simplify the loading, validation and aggregation of detailed policy-level data, and to provide secure, rights-based access to users. Thus, all the behind-the-scenes heavy lifting associated with databases, security, hardware, redundancy, and – you get the picture – is already done. This means you're up and running quickly at low cost.

Does that mean your solution is “canned”?

No. We take pride in delivering tailored solutions that are flexible yet cost-effective. Our clients typically have unique data they wish to integrate into their solution – such as from other internal systems or third-party sources. So we understand the need for customized views into your data and flexible research and analysis tools. We are a DTCC solutions provider with expertise in PVF, FAR, COM and other file formats, and we bring over twelve years of experience delivering intelligent business solutions to the life and annuities industry.

Can Lansare improve our self-service website, call center and customer service operations?

Lansare.Insight offers a web portal that enables your clients and advisors to view accounts, access forms and product information, perform service requests, and rebalance or transfer funds on variable sub-accounts. Customer service and call center staff can quickly search for and respond to direct customer inquiries about their policies and plans.



What about sales? How can Lansare help us conserve and grow our book?

We offer data mining tools that enable you to generate automated alerts to your advisors. Alerts can be triggered by any life or policy-based event, such as age-driven dates, beneficiary changes, contract anniversary dates, or surrender schedule and rate guarantee expirations. You can also allow advisors to set alerts on sub-account changes, transfers and reallocations, or changes in deposit and withdrawal patterns. In addition, the detailed policy-level data is useful for portfolio-level reporting and performance analysis on your book of business, including drill-down and roll-up reporting by advisor, branch and territory; or facilitating customer profiling and market segmentation analysis.

You mentioned compliance. How can Lansare help in that regard?

We enable your compliance team and surveillance analysts to conduct portfolio-level monitoring on your in-force contracts. Analysts use built-in tools for discovering and researching trends and patterns in account activity at the advisor, branch, carrier, or product level, and across specific customer demographic segments, such as seniors. Our platform supports other compliance needs including AML, Patriot Act and suitability analysis. Reports, automated alerts, and analysis tools are tailored to your specific needs, while our Microsoft Excel[®] export feature provides unlimited flexibility.

Is your solution secure?

All transmissions of data are secured using industry standard practices and methods including 1024 bit SSL and Secure FTP. The physical environment is a world-class SAS 70 II and PCI compliant hosting facility with redundancy and security built into every part of the infrastructure.

Can we afford this solution?

Our solution is very affordable – typically pennies per contract per month, and offers a quick return on investment. Pricing is proportional to the size of your book of business and how often your data is updated. No hardware, software, or staffing procurement is required. Up-front setup costs can be small, and ongoing changes that you request are often provided at little or no cost. Custom business needs requiring significant development are billed on a reasonable time and materials basis.

About Lansare

As a pioneer in on-demand financial software, Lansare manages detailed customer, sales and business data on a daily basis, including approximately one-million contracts and over \$50 billion in contract value. Our software-as-a-service model delivers a cost-effective, rapidly implemented tool that provides immediate ROI.

More questions?

Please call us toll-free at 1-877-204-0148. We'd be happy to show you our platform.