

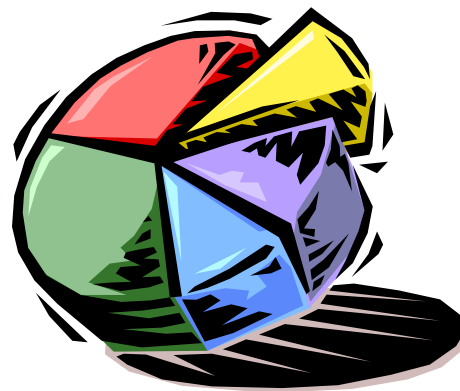
SmartOffice 2009 BGA Webinar Series

PCM Series: Alternative Practices for Pending Case Downloads

Welcome! This Webinar will be approximately 30 minutes in length.

Dial-in: 712-432-3900

Pin: 984124



Agenda

AGENDA		
August 13, 2009	Topic	Approx. Time
	Welcome and Introduction Meg Rose, FLMI, ACS Business Relationship Manager E-Z Data	5 minutes
	PCM Series: Alternative Practices for Pending Case Downloads Todd Cohen Integrations Product Manager E-Z Data	20 minutes
	Q&A Session <i>BGA Participants</i>	5 minutes

iLinc | BGA Webinar Series

File Edit Controls Tools Session Help

Dial In Number: 712-432-3900 Passcode: 984124

Attendees | 0 / 1

Meg Rose

Session Details
Session Name: BGA Webinar Series
Leader: Meg Rose
Date/Time: 08/06/2009 11:00 AM

Audio Details
Primary Dial-In: 712-432-3900
Passcode: 984124

Public Private

Type here to send a message

Share your Desktop
Share a Region
Share an Application
Draw on a Whiteboard

Send Quick Invitation
Send Invitation via IM (copy)
Record Session

Smart

EZ DATA
INCORPORATED

start | Yahoo! Messenger | 3 Microsoft Offic... | Microsoft PowerPo... | iLinc - Windows Int... | iLinc | BGA Webina... | 1:36 PM

Today's Topic and Focus Areas

- Carrier Pending Case Download
 - Current Carrier Partners
 - Side-by-Side Case Processing
 - Direct Download and Replace
 - Improvements and Flexibility of Use

- Noteworthy Additions & Related:
 - Prudential 2-Way
 - New Carrier Partners

Insurance Carrier Data Providers

AIG

American General

AVIVA USA

The AXA Group

Banner Life

Companion Life

First MetLife Investors

First Penn Pacific

General American Life

Genworth Financial Group

Genworth Life Insurance Company of New York

Genworth Life and Annuity Insurance Company

GE Long Term Care

ING Group

Jefferson Pilot

John Hancock

John Hancock Long Term Care

Legal and General America Inc.

Lincoln Financial Group

Lincoln Life Annuities of NY

Lincoln Life Insurance Company

Lincoln Benefit Life

Lincoln Benefit Life of New York

MassMutual

Manulife Financial

Metropolitan Life Insurance Co.

Metropolitan Life and Annuity Company of Connecticut

MetLife Insurance Company of Connecticut

MetLife Investors USA

Metropolitan Tower Life

Mutual of New York

New England Financial

Nationwide Life Insurance Company

North American Company for Life and Health

Pacific Life Insurance Company

Phoenix Life Insurance Company

Principal Financial

Protective Life

Prudential Life Insurance Co.

Prudential CO of NJ

Prudential Life and Annuity

Prudential Select Life

Reliastar Life

Reliastar Life of New York

Savings Bank Life Ins Co of Massachusetts (SBLI)

Securian

Security Life of Denver

Sun Life Financial

Transamerica Life Insurance Company

Transamerica Occidental Life Insurance Company

United of Omaha

USLife

West Coast Life

William Penn

<http://www.ez-data.com/partners/pending>

Pending Case Download Benefits

- > Data from many Carriers combined within SmartOffice
 - Reduce the need to jump to various web sites
- > Automatically updates SmartOffice Pending Cases
 - Home Office provides details and status of your cases
 - Requirements updated several times per day
- > Improved management reporting
 - Generate client-level reports, regardless of carriers
- > Increased efficiency
 - Easily update and organize pending cases & requirements
 - Minimizes data entry errors
 - Follow-up dates can be assigned to Requirements

Todd Cohen

Integrations Product Manager

E-Z Data

Getting Started/Contact Info

1. Request Pending Case Downloads for Carrier Partners through E-Z Data:
<http://www.ez-data.com/partners/pending.shtml>
2. Use E-Z Data for a Quick Start and Training – set up a your own agency iLinc and discussion to walk through it:

Todd Cohen

Todd.cohen@ezdata.com

434-522-4033

BGA Support

434-522-4069

bgasupport@ez-data.com

Takeaways

- ❖ Requesting Pending Case Downloads from your carriers through E-Z Data
- ❖ Understanding of difference between “Side-by-Side” and “Direct Download and Replace” for case processing
- ❖ Understanding processing of Pending Cases using “Side-by-Side” and an alternate means for processing
- ❖ Added value of Prudential’s 2-Way Requirement Communication feature with use of Pending Case Download options

Annual BGA CPC is Fast Approaching

- > *September 13-15, 2009*
- > St. Louis, MO
- > Exceptional learning and networking opportunities
- > New Pre-Conf Session Sun afternoon
- > User Driven - Input from BGA Advisory Council
- > Take Me Out to the Ball Game – It's fun too!
- > Register at: www.ezdata.com/bga



Further Questions?

***How Can We Be a Better
Business Partner?***

E-mail: meg.rose@ezdata.com

Phone: (626) 585-3505 x7366

Thank you for your time and your business.