allegroupe

GROUP BENEFITS ADVISOR

A skillfully orchestrated module for profitable business development

Because time is of the essence...

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The flexible structure of the Group Benefits Advisor modules lets you meet a wide range of needs and objectives (for sales, team management, or professional business management), without playing havoc with your budget.

The **Group Benefits Advisor Independent and Independent +** modules offer simplicity and productivity at a price that puts this powerful, efficient technology within the reach of most advisors. With this comprehensive management tool, ALLEGRO *UPE* is meeting two goals:

1. To make management of existing portfolios easier by

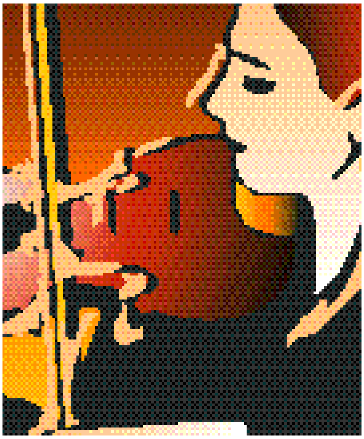
- calculating payroll deductions;
- calculating and optimizing taxable benefits applicable to each employee on payroll, according to the employer contribution plans or insurance coverage options;
- performing "what-if" calculations;
- printing a set of highly useful reports;
- producing coverage statements for employees.

2. To provide for professional development of new business by

- managing client's requests for proposals;
- providing fast manual or electronic input of key information for tendering bids;
- automatically converting proposals into contracts and vice versa, thus eliminating human intervention and saving time and energy while reducing human errors;
- handling the analysis of proposals developed for a client;
- inputting confirmed sales.

ALLEGRO*UPE*'s **Group Benefits Advisor Independent +** module also includes:

- simulation of real-time invoicing, taking all transactions and plans (modular, flexible or division/class) into account to make deduction calculations more accurate;
- access to two very useful reports:
  - individual invoices, so that absent employees can be billed for amounts that would otherwise be deducted from pay;
  - individual year-end statements with a summary of the premiums paid by the employee during the year, which is very useful to employees when preparing their tax returns.



The **Group Benefits Advisor Brokerage Centre** and **Brokerage Centre +** modules provide the perfect complement to the **Independent** and **Independent +** modules, by offering simultaneous portfolio management for group benefits advisors working for the same firm.

A **Distribution Centre** sub-module is also available, to optimize business transactions and business development between group benefits professionals and their business or referral centres.

The **Group Benefits Advisors TPA** (Third Party Administrator) module is aimed at highly specialized advisors who, in addition to the usual sales and service activities, also handle enterprise billing for the insurer.

The TPA module includes every feature of the **Brokerage Centre** and **Enterprise Self-Administration** modules, as well as the following:

- Management of the insurer's net rates and handling of monthly remittances to the insurer;
- Management of administration fees and commissions paid to the brokerage centre and the intermediary(ies) assigned to files;
- Management of gross rates (net rates + expenses + commission) used in billing the client;
- Separate accounting for the three cost centres in question (insurer, client and brokerage centre).

A skillfully integrated family of services... Because time is of the essence

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is software that has been standardized and optimized to ensure professional and profitable business development.

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is designed to reduce management costs and improve data control at every level of data administration.

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offers simplified tools that can be electronically linked to insurers or enterprises.

allegroupe

offers **multiple-insurer**, **multiple-contract** management to meet the needs of enterprises who want to manage everything from a single database.

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is supported by a growing number of insurance partners.

MDI

Because time is of the essence...

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