FireLight® pre-sale**functions**

FireLight®

Accelerate Onboarding and Drive Compliant Sales

FireLight® Pre-Sale Functions supports various pre-sale activities prior to the product recommendation or application process. With rules-driven data collection, assessment, e-signature, and review capabilities, FireLight Pre-Sale Functions delivers a comprehensive and efficient data capture, authorization, qualification and client management process for both carriers and distributors. The result is a seamless and compliant sales experience.

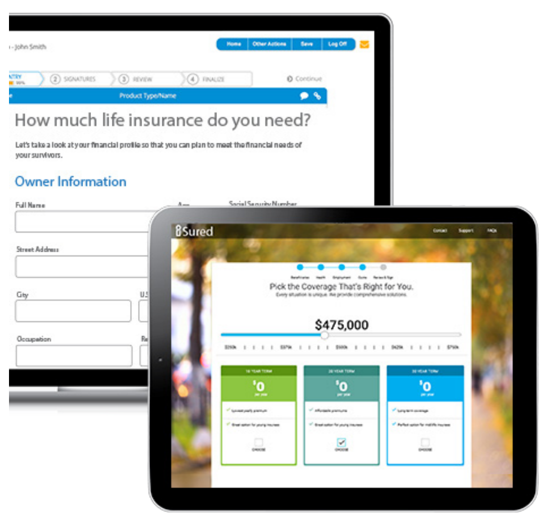
FireLight Pre-Sale

- Needs Capture and Determination
- Account Opening
- Know Your Client Questionnaires
- Custodial/Trust Account Opening
- Field Underwriting
- Pre-Sale Authorization and Disclosures
- Advisor/Agent Contracting
- Product Filtering/Selection
- Fee & Expense Repository and Disclosures
- Needs Calculators
- And more...

Simplify Compliant and Suitable Sales

FireLight Pre-Sale Functions provides carriers and distributors the configurability and tools to support their unique business processes, workflows and requirements. Whether completing a "know your client" questionnaire, performing field underwriting or opening a trust account, captured data seamlessly flows into other FireLight sales activities, creating an efficient and cohesive sales experience, while automating suitability and compliance processes.

- Rules-driven data collection, assessment and review
- Built-in e-Signature with multiple signing options
- Intuitive form, wizard and consumer experiences
- Single sign-on and data/system integration
- Robust workflow, review and approval management
- Automated audit trail and usage reporting
- Data integration into other FireLight components
- Comprehensive self-service tools and platform features



Modernize your pre-sale requirements to streamline sales from the beginning