



FireLight pre-sale**functions**



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.

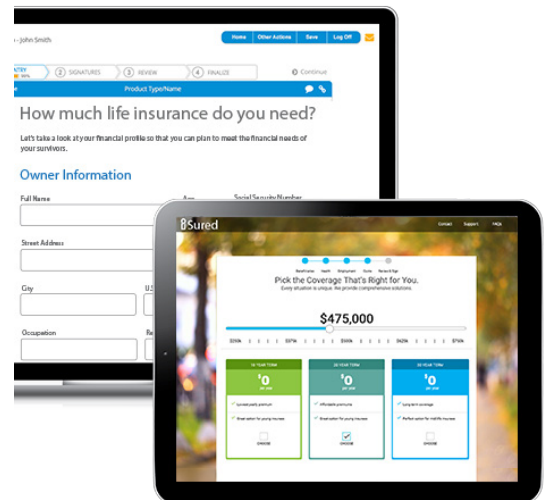
FireLight Pre-Sale

- ✔ 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



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