



**Achieve  
More™**

# Through Every Step of the LPL Insurance Lifecycle



## Streamline Operations

Accelerate intake, approvals, and manage complex risks within a unified system

- Automatically load current attorney rosters and the latest state bar information. Tailored reminder notices for renewal, new business, late payments and more.
- Enhance quote turnaround and reduce manual effort by using ISI AI to extract submission data, apply underwriting guidelines, and route tasks and approvals across your underwriting team.
- Strengthen policyholder and distribution partner loyalty and self-service capabilities through ISI Portal or existing digital channels via ISI Connect.



## Better Manage Risk

Enhance underwriting precision and exposure management

- Rating algorithm support with automatic and discretionary debits and credits, such as claims-free and continuing legal education (CLE) credits.
- Automatic excess of loss treaty ceding and recovery to manage exposure and optimize cash flow.
- Quickly quote multiple tail coverage options at the firm and attorney level, with automatic claim coverage verification based on RDI.



## Unlock Insights to Drive Better Decisions

Empower every function with connected insights for strategic decision-making

- Gain a real-time, company-wide view of performance by unifying policy, billing, claims, accounting, and reinsurance data.
- Build real-time dashboards to support trend analysis, board reporting, and ongoing operational performance with ISI Core Analytics.



## Drive Sustainable Growth

Reduce total cost of ownership without impacting business agility

- Rollout new products, adapt rating logic, and coverage changes quickly using low-code/no-code configuration tools.
- Grow your premium volume with automation and carefully selected risks, not through headcount or disconnected systems.



**CORE**

## System Modules and Full-Service Support



Policy Admin



Billing



Claims



Accounting



Reinsurance



Support



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## Achieve Business Outcomes Faster

Experience a proven path from implementation to impact

- Accelerate time-to-value with a streamlined implementation process that minimizes disruption.
- Achieve long-term budget and support certainty, without the overhead of maintaining systems in-house.
- Leverage a team with six successful LPL implementations that understands your departmental needs and goals.



AI

## Accelerate Submission Intake and Underwriting Decisions with Purpose-Built AI

- Extract and structure submission data from emails, portals, and supporting applications to reduce manual effort and improve review-to-quote service levels for distribution partners and new customers.
- Produce insights based on insurer-defined guidelines, risk appetite, and targeted web searches of applicants.
- Maintain oversight with an underwriter-in-the-loop review process to validate AI outputs and improve data quality for downstream claims, accounting, and reinsurance use.



PORTAL

## Expand Digital Services and Strengthen Every Connection

- Reduce service inquiries and improve insured and broker satisfaction by enabling self-service access to policies, documents, claims reporting, and all related communications.
- Optionally extend the portal to offer quoting, policy issuance, and renewal management.

### Our LPL Customers



**Let's set up a meeting to better understand your unique needs  
and how we can accelerate results with minimal disruption.**

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