



**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

THE
BAR PLAN



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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