



HORTON

PROFORMEX CASE STUDY

Taking Proactive Client Outreach to the Next Level with Proformex



THE CHALLENGE

For years, insurance professionals have been lacking the tools and technologies they need to proactively monitor clients' life insurance policies in the same manner that they're able to monitor other assets.

Teams like the one at The Horton Group have long been searching for a system to change that, because they understand that life insurance is just as important as other financial instruments for a client's overall plan. They also know that there can be a ton of untapped opportunity in their life insurance book.



THE SOLUTION

Paul Shaheen, a 30+ year veteran of The Horton Group, implemented Proformex's post-sale client and policy management platform to proactively monitor his clients' life insurance policies. With our technology, he is now able to stay ahead of any potential risks and sales opportunities because he can access all his data from a single login. He is also eligible to receive alerts on important policy milestones – like upcoming term conversions, policy anniversaries, or policies entering lapse-pending – which gives him the information and time he needs to act.

As a result, Paul's clients can expect that their coverage will continue to meet their needs throughout their lifetime because it's being actively managed and not ignored.

“Proformex has taken my ability to track my sales and clients to an entirely new level. Before Proformex, I simply didn't have the mechanism to easily find my existing clients and policies but now I can track clients/policies on an anniversary and client birthday basis, and can even alert me, for example, when a term policy is up for conversion rights expiry. It has helped significantly increase my ability to keep in touch with current clients and create new opportunities as well.”

– Paul Shaheen, RHU, REBC, Sales Consultant – Vice President of The Horton Group

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About the Horton Group

The Horton Group began in 1971 as a single location, eight-person insurance agency in Orland Park, Illinois. Today, Horton is a large, stable insurance broker that delivers complex solutions to thousands of customers. The company currently features seven offices in four states.

Horton provides businesses with a value proposition – tangible services – that other brokers do not match. Additionally, The Horton Group utilizes a professional approach in managing the Company's core business operations. This unique combination of service capabilities and business excellence gives Horton's clients real value when compared to what competing insurance brokers can offer.

The Horton Group does not take its success for granted. Through continuous improvement and innovation, the Company is able to develop superior risk and benefit programs for clients who are leaders in their field. In the areas of risk management, insurance and employee benefits, Horton provides programs and methodologies that are proven to lower costs and increase value.

Horton adds to its service capabilities through acquisitions and new venture opportunities. These strategies, along with the Company's tools, techniques, and talent, come together to form Horton's aggressive, growth-oriented culture of quality.

About Proformex

Proformex is a data and technology platform purpose-built for financial professionals and institutions to manage life insurance and annuity assets. With deep data and technology expertise, Proformex connects customers to critical information about their life insurance and annuity businesses and helps them make better informed, data-driven decisions. With Proformex, financial professionals have the technology tools needed to proactively manage life insurance and annuities and enhance value for their clients.