

# Maximizing Value with Carrier Data Feeds

## Carrier Data Feed Overview

Proformex aggregates, consolidates, and visualizes data from several sources to help create value for our customers. Data feeds can play a pivotal role in the Proformex platform.

Currently, Proformex receives data feeds from more than 20 approved carriers. **These carrier data feeds can only be authorized at the distributor or broker-dealer level.** The process of obtaining feeds is dynamic and ongoing, and we

are in constant conversations across the carrier network to expand the number of our feeds. Throughout the process of onboarding your carriers, Proformex will be with you every step of the way.

The information here highlights the data feed onboarding process, our carrier relationships, and some of the best practices and key considerations.

## Here's What to Expect

Enablement is an ongoing process. Timing will vary by carrier and relationship. We typically see incoming carrier data feeds 4-6 weeks from the time the carrier approves the feed, depending on the ease – or difficulty – of carrier outreach. As timelines will vary for each relationship by carrier, Proformex provides consistent status updates. In these feeds, expect to see updated information on multiple values including core fields such as cash value, policy status, and death benefit. In most instances, these values update on a monthly basis, though some are more frequent. As you utilize Proformex, note that other key values such as lapse age and crediting rate are available only through carrier documents and will still need captured. The goal of utilizing these data fields is to help you prioritize which policies to look at and make proactive decisions instead of reactive decisions.

Proformex will work with you at every step:

### Data Discovery & Carrier Strategy

- Identify carriers and policy counts
- Review carrier's feed status
- Gather unique identifiers for authorizations



### Data Feed Setup

- Establish points of contact
- Sign necessary authorization forms
- Proformex begins carrier outreach
- Customer alerts their contacts at each carrier of Proformex relationship and data request



### Status Tracking & Updates

- Proformex tracks the status of the carrier outreach
- Proformex provides regular updates



### Ongoing Data Receipt

- Proformex will communicate as data is received
- Proformex will review the data's integrity for population in the platform
- Data refreshes on a consistent schedule



## Onboarding Check List

- Data Discovery
- Carrier Strategy
- Data Feed Authorization
- Status Tracking and Updates
- Ongoing Data Receipt

## Carriers with Active Feeds with Proformex

AIG	Jackson	North American	Security Benefit Life*
Allianz	John Hancock	Pacific Life	Securian
Allstate	Lincoln National	Penn Mutual	Sun Life
AXA / Equitable	Minnesota Life	Principal	Symetra
Banner	Mony Life	Protective	Transamerica
Delaware Life	Mutual of Omaha	Prudential	Western & Southern / Integrity
Genworth	Nationwide	Sammons Financial Group	MORE TO COME...

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\*Authorization required from Broker-Dealer

## Carriers in Discussions

American National	Forethought	Ohio National
Brighthouse	Global Atlantic	Security Life of Denver
CMFG	Hartford	TIAA
Columbus Life	National Life	United Life
Equitrust		Zurich

<b>CARRIER</b>	<b>LIFE PRODUCTS AVAILABLE</b>		
	<b>Term</b>	<b>Variable</b>	<b>Non-Variable</b>
Allianz	Y		Y
Allstate		Y	Y
AXA / Equitable	Y	Y	Y
Banner	Y		
Delaware Life		Y	Y
Genworth		Y	Y
Jackson National	Y	Y	Y
John Hancock	Y	Y	Y
Lincoln National	Y	Y	Y
Mony		Y	Y
Nationwide	Y	Y	Y
North American	Y	Y	Y
Mutual of Omaha	Y		Y
Pacific Life	Y	Y	Y
Penn Mutual	Y	Y	Y
Principal	Y	Y	Y
Protective	Y	Y	Y
Prudential	Y	Y	Y
Sammons Financial Group	Y	Y	Y
Securian / Minnesota Life	Y	Y	Y
Security Benefit Life*		Y	
Sun Life	Y		Y
Symetra	Y	Y	Y
Transamerica	Y	Y	Y
Western & Southern			Y

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# Best Practices



**Set a Point of Contact** – Proformex does the heavy lifting but will need the customer’s help from time to time; this is where having one main point of contact will be imperative.



**Contact your team at each carrier** – Inform them of the relationship with Proformex and that you will be turning on data feeds.



**Understand that the process is ongoing** – As mentioned above, the process is dynamic and ongoing. Proformex will keep the customer informed every step of the way and communicate as progress is made.



**Start with a book of business report** – The book of business report will be used to populate the platform with initial values. Having this report ready to go when beginning the onboarding process helps increase the rate at which the customer can begin seeing the value of Proformex.



PROFORMEX

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