

WealthServ Expands In-Force Life Insurance Data Feeds

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BlueSun today announced they are now integrated to eight (8) of the major Canadian carriers for policy in-force feeds, making WealthServ the most connected Wealth Management software in Canada.



– In bringing on new MGAs to its SalesDrive software, WealthServ has integrated further carrier in-force policy data feeds to bring the number to eight (8). SalesDrive uses in-force data feeds from carriers to extract real and often overlooked opportunities in the advisor’s in-force block of business. Advisors receive a complete package containing all the opportunities with detailed information and pre-filled application forms to drive the sale. By taking the legwork out for Advisors in finding leads, SalesDrive makes it simple to stay on top of sales opportunities, service existing clients and capture the additional revenue existing in their client base.

“We now have pending and in-force feeds from eight of the largest carriers, paramedical feeds from Watermark, ExamOne, Hooper Holmes and Quality Underwriting, and investment feeds from FundServ and Fundata.” explained Simon Tomlinson, CEO of BlueSun. “Integration means less manual effort and therefore reduced cost, which we know is important for MGAs. The Life Insurance supply chain is pretty fragmented in Canada and we are trying to make it smoother for our clients.”

WealthServ uses daily pending feeds from carriers to provide up-to-date information on the status of policies to MGAs and their advisors. This reduces the number of calls the MGA has to field and allows the Advisor to keep their clients informed. Paramed feeds automate the initiation of insurance tests and the communication of results, cutting cost from administration.

“We plan to start working on commission feeds from the carriers later this year.” Tomlinson continued. “WealthServ will use commission feeds to further reduce the effort required to process commission allocation. We also expect that with commission feeds, WealthServ can help MGAs to spot any commission discrepancies between what is expected and actual payout, which everyone knows is a problem.”

About WealthServ

WealthServ, a BlueSun product, is a leading business solution for insurance and investment agencies in North America. WealthServ provides integrated back office and CRM technology across life insurance and investment products for MGAs and MFDs. WealthServ is a Unified Wealth Management platform that delivers everything required for serious wealth management distributors to process all lines of business with one system.

[WealthServ website](#)

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