

Propelling your business forward to help everyone achieve lasting financial security

AT A GLANCE



✓ **28+ years** in business

✓ **30+** Products

✓ **850+** global employees

\$33/55 Billion **\$33 Billion** in life insurance premium and **\$55 Billion** in annuities collected globally in 2022 through our platforms



Global footprint

- US – UK – Canada
- Headquartered in **Exton, PA USA**

Roper

TECHNOLOGIES

Business unit of **Roper Technologies** (Nasdaq: ROP), a constituent of the S&P 500® and Fortune 1000® indices

Trusted by Our Customers

- **100+** Insurance Carriers/Providers
- **2,500+** Broker Dealers, BGAs, IMOs, MGAs and National Accounts, and Financial Institutions
- **500,000+** Global Agents and Advisors/Advisers



Areas of Expertise

- **Life Insurance** (US, UK, and Canada)
- **Annuities** (US and Canada)
- **Wealth Management** (US and Canada)
- **Pensions** (UK)

A Global Leader in the Industry

- ★ **2023 COVER Excellence Awards**, Insurtech of the Year – UK
- ★ **2022 WealthManagement.com Awards** Finalist – US
- ★ **2022 Global InsurTech 100 Award** – US
- ★ **2022 COVER Excellence Awards**, Insurtech of the Year - UK
- ★ **2021 Top Workplaces** in the US
- ★ **2021 Global InsurTech 100 Award** – US
- ★ **FinTech Awards 2021**, Best Life Insurance Software Solutions – UK
- ★ **2020 Protection Review Winner** – UK
- ★ **2020 COVER Excellence Award Winner** – Best Protection Platform – UK
- ★ **2019 COVER Customer Care Award** – Best Tech Service – UK



Competitive Benefits – and How We Help You



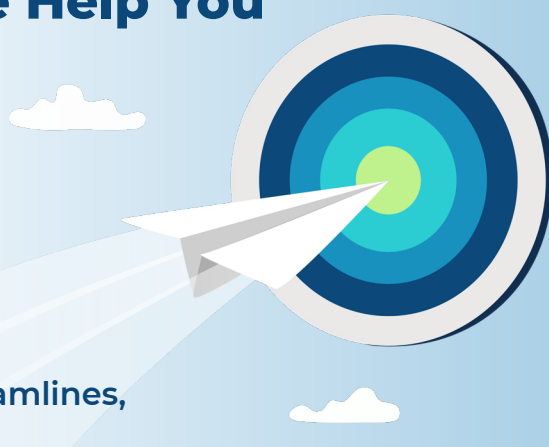
We take you **FROM**

slow-moving paperwork processes and disjointed solutions and bottlenecks



TO

innovative technology that **digitally** streamlines, automates, and **transforms** your business



With iPipeline's innovative technology, we help you:

- ✓ Shorten cycle times
- ✓ Reduce delivery costs
- ✓ Minimize entry errors

How Do We Do This?

Our industry leading end-to-end platform is designed to **digitally transform** your business



Our **innovative products** streamline process automation to provide you with the tools you need



We help you create a fast and integrated customer, adviser/advisor, and agent experience - from quote to commission

We Help You Transform Your Business

Core Services:

- **QUOTES & ILLUSTRATIONS**
- **E-APPLICATION**
- **UNDERWRITING**
- **E-DELIVERY**
- **DATA ANALYTICS & AI**
- **E-SIGNATURE**
- **POLICY ADMINISTRATION (UK)**



The Results?

We can help you transform your manual operations into a **secure, seamless digital experience** – from proposal to commission.

The iPipeline Difference

- One of the **leading providers** of cloud-based software solutions in the industry
- The most **comprehensive and integrated digital solution** on the market
- **Continually invest** in our infrastructure and platform
- **Data that is fully protected** and secure
- A **simplified and seamless process** to help improve the customer and agent/advisor/adviser experience while increasing customer satisfaction



We deliver innovative solutions that connect, simplify, and transform the industry.

Find out more about iPipeline! **Let's talk!**

SPEED. EFFICIENCY. TRUST.