

Comprehensive Policy Servicing



Premium Payment Management – Ensures timely, uninterrupted coverage.



Verification of Coverage (VOC) – Direct carrier confirmations to verify status.



Insured Tracking – Continuous monitoring of insureds for updates.



Claims Processing – Support and coordination from claim to payout.



Premium Optimization – Helps reduce overfunding and preserve capital.



Medical Records Acquisition – Compliant and efficient health data retrieval.



Secure, real-time portal for full policy servicing access



View and manage all **policy, premium, and insured info**



Place and **track customized service** requests seamlessly



Download documents and monitor **request status** anytime

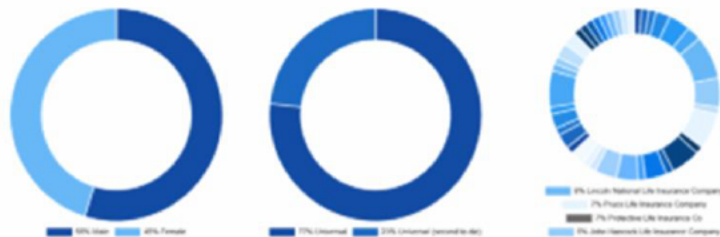


Built for **institutional scale** and **transparency**

Online Servicing Portal



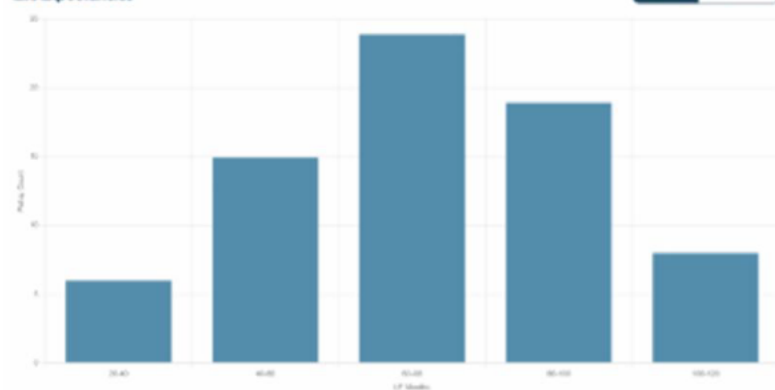
Data, Reports, Orders, Live Health Updates and More



Age Group



Life Expectancies



EQ 0921 Reports

AVERAGE LE	AVERAGE AGE	AVERAGE DB	AVERAGE MATURED DB
70.00 months	81.86 years	602,893 USD	772,760 USD

Datafile

Download

Recent Health Tracking Activities

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Date	Policy Code	Age	Life Expectancy	Death Benefit	Notes
June 20, 2025	EQ 0921 D - Barkley	73.58	96.0months	1,000,000 USD	6/23/25 - Spoke with Jack L B.
June 5, 2025	EQ 0921 C - White	76.51	72.0months	100,000 USD	6/5/25 - Spoke with Denise W.
May 17, 2025	EQ 0921 A - Powell	83.84	65.0months	141,704 USD	5/17/2025, I spoke with Arthur
March 20, 2025	EQ 0921 D - Barkley	73.58	96.0months	1,000,000 USD	3/20/25 I spoke with the insured
January 28, 2025	EQ 0921 C - White	76.51	72.0months	100,000 USD	1/28/25 I spoke to the insured,
January 27, 2025	EQ 0921 A - Powell	83.84	65.0months	141,704 USD	1/27/25 I spoke to the insured
January 1, 2025	EQ 0921 B - Sabot	90.14	35.0months	772,760 USD	1/2 Confirmed speaking to Iris.
December 18, 2024	EQ 0921 D - Barkley	73.58	96.0months	1,000,000 USD	12/18 Spoke to insured Jack an.

Previous **1** 2 3 4 5 Next

Recent Policy Value Activities

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Date	Policy Code	Account Value	Surrender Value	Surrender Charge	Cost of Insurance	Cost of Insurance Date	Last Premium	Last Premium Date
August 11, 2025	EQ 0921A - Powell	0.00 USD	0.00 USD	4,205.77 USD	830.00 USD	August 7, 2025	5,539.00 USD	April 28, 2020
August 1, 2025	EQ 0921C - White	1,290.15 USD	1,290.15 USD	0.00 USD	177.87 USD	July 28, 2025	544.65 USD	June 5, 2025

John Sample

- Owner
- Policy Information
- Primary Insured & LE
- Cost Basis & Valuation
- Orders

Policy Requests

Illustration

[Start Order](#)

Written VOC ⓘ

Start Order

Annual State

[Start Order](#)

Remove Sold Policy ⓘ

Start Notif

Policy Pre Sale Support [Start Order](#)

Premium Optimization ⓘ

Start Order

Insured Requests

HIPPA [Start Order](#)

Script Run ⓘ

[Start Order](#)Medical Records [Start Order](#)

Life Expectancy ⓘ

[Start Order](#)