

# Manage Benefits and P&C with Applied Epic®

**Applied Epic, the fastest-growing cloud-based brokerage management system in the world, provides essential capabilities for you to better manage policy and benefits administration across all lines of business, reducing time and expenses spent managing separate systems.**

For the first time in the insurance industry, Applied Epic incorporates native benefits functionality so that you can easily manage both your P&C and benefits book of business in a single application. The robust benefits capabilities within Applied Epic provide you with a single source of truth about your customers so that you can capitalize on cross- and up-sell opportunities.

## **Applied Epic Benefits provides your brokerage with:**

- Benefit-specific screens to capture general plan information, rates, coverages, eligibility criteria, stop loss, and TPA information.
- Commission rate tiers, including flat-fees per risk.
- Unique, pre-built custom forms and templates to present plan summaries, including summary of benefits and coverage.
- Support for tracking and billing.
- RFPs and plan summary comparisons created through plan/coverage detail export.
- Insured detail import of census and election information.

“As we expand our focus into commercial and group Benefits, Applied Epic enables us to consolidate from disparate systems to one system to manage all lines of business across all roles and locations.”

Anne Martel, Co-President, Martel & Martel Assurance

## **Enables your brokerage to**

- Gain a complete and holistic view of each customer and prospect across all lines of business
- Identify cross- and up-sell opportunities easily
- Reduce data entry
- Deliver faster, more efficient service

## **Why Applied?**

Applied Systems is the leading global provider of cloud-based software that powers the business of insurance.

Recognized as a pioneer in insurance automation and the innovation leader, Applied is the world's largest provider of agency and brokerage management systems, serving customers throughout the United States, Canada, the Republic of Ireland, and the United Kingdom.

Call 866.899.5120  
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