

# Applied Recon

## AI-powered reconciliation, built into Applied Epic®

### Direct bill. Agency bill. One AI-powered workflow.

Today, reconciliation is split across separate processes and third-party tools. Applied Recon pulls it into Applied Epic, where AI reads every carrier statement in any format, matches it line by line, and reconciles it in a fraction of the time, with your team approving every step. No more juggling separate processes. No more bolt-on tools.

### Why brokerages need it:



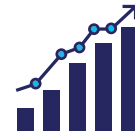
#### Get paid faster

Reconcile both billing types in a fraction of the time, so commissions land and producers get paid sooner.



#### Cut E&O risk

Statement data and exceptions live inside Applied Epic, not scattered across separate processes and third-party tools.



#### Built to scale

Take on growing statement volume with less manual work, so the team has more time for clients and the work that grows your brokerage.

### One application. Both billing types.

#### Direct Bill - Available Now

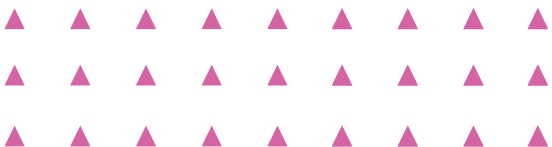
##### Carrier commission statements

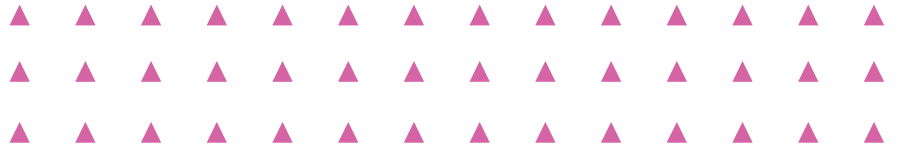
- AI matches every line to your Applied Epic transactions, even when the match is partial
- Post suspended or finalized reconciliations to the General Ledger in one click
- Broad certified-carrier coverage, with the freedom to onboard more yourself

#### Agency Bill - New in July 2026

##### Agency-bill payables

- Upload agency-bill carrier statements and let AI extract, match, and build Premium Payable reconciliations
- Resolve Amount to Pay and Write-Off decisions right inside Applied Recon
- Automate premium allocation and payment tracking for agency-billed policies





## New in July 2026: more of accounting

### Automated Receipt Creation

Bring in ACH commission deposits in bulk instead of keying them line by line. Saved mappings make every future import faster still.

### Gather Statements from Email

Forward carrier statement emails to your brokerage's Applied Recon Inbox and they arrive ready to review.

### User-Generated Mappings

Onboard carriers beyond the certified list yourself. Upload a sample statement, confirm the AI-suggested field mappings, and reconcile it from then on. Direct bill at launch, agency bill in August.



### AI matches,

your team reviews  
and approves



### 90%+

of certified P&C and Benefits carriers  
covered, direct and agency bill



### Any format

PDF, spreadsheet, CSV, or  
Ivans download, read by AI

**Applied Recon streamlines the accounting work your team handles every day, all inside Applied Epic.**

Contact your Applied representative to see Applied Recon in your brokerage.