



## Key Benefits of Financial Advisor Solutions

- A solution accelerator tailored for life insurance industry; less expensive, faster to implement and eliminate hefty license cost
- Compatible with the widely used policy admin systems (eg. OLAS, Ingenium) and flexible integration with third party applications enables seamless integration
- Supports a wide range of life insurance products
- Powerful calculation engine enables dynamic configuration of algorithms
- Online application generation and submission reduces turnaround time for policy issuance
- User preferred application theme configuration, on-the-fly charts and graphs generation, and rich user interface provides excellent user experience
- Ability to synchronize online and offline applications enables seamless data availability
- Dynamic template creation and management, and Product setup wizard help administrators to maintain modules with ease

Experience the power of planning with Mphasis Financial Advisory Services. Mphasis Financial Advisor assists you in making financial decisions by analyzing your portfolio needs and recommending the best solution path.

In today's fast growing business environment, insurance selling has become highly competitive and the players are continuously innovating new channels to attract customers.

Financial Advisor solutions from Mphasis is a powerful package for driving growth. This is a need of the hour tool for revenue generation for insurance companies with a high degree of sales compliance. We create financial decisions professionally by analyzing customer financial needs and recommend the best solution.

## Mphasis Services

Mphasis' Financial Advisor solutions cover end-to-end sales prospecting and consist of three major modules:

1. Financial Need Analysis (FNA): Captures customer, personal, life style and financial needs, performs analysis, and leads to suitable products recommendation
2. Sales Illustration System (SIS): Generates dynamic sales illustrations or quotes with an easy and simple configurable product setup
3. Electronic Applications (eApps): Helps generate dynamic insurance applications for the generated illustration

Our dedicated professionals bring vast experience, specialized skill sets and deep industry knowledge to our clients.

### Financial Need Analysis (FNA)

- Captures customer's personal details, financial goals and objectives, performs need analysis and recommends suitable insurance products
- Story board concept to get information
- Scoring mechanism determines investing nature
- Recommends suitable insurance products based on analysis

### Sales Illustration System (SIS)

- Generate dynamic sales illustrations with an easy and simple configurable product setup
- Template driven illustration output, which can be designed
- Rule engine to calculate premiums and generate illustrations
- Offline mode for agents to work seamlessly
- Secure and safe online-offline synchronization maintains data integrity
- Multi-channel distributor versions

### Sales Illustration for Administration (SIA)

- Product maintenance module for SIS
- Master screen setup can be performed through this module. Lookup and tools configuration provides complete control.
- Create, modify and maintain all your insurance based products
- Import rates, specify rate details for premium calculation process
- Dynamic algorithm engine to set up business logic at plan level through actions, conditions and rules
- Administrator can design templates specific to their products

### eApps

- Dynamic insurance applications for the generated illustration
- Simple step-by-step process for collecting necessary information
- Dynamic underwriting document requirements
- Product based medical questions to be filled instantly generates and submits online application for customer

## About MphasiS

MphasiS is a leading Applications, Infrastructure Technology, and Business Process Outsourcing services provider. The company delivers real improvements in business performance for clients through a combination of technology know-how, domain and process expertise. With currently over 34,000 people, MphasiS services clients in Financial services, Manufacturing, Healthcare, Communications, Media & Entertainment, Transportation & Logistics, Energy & Utilities, Consumer & Retail industries and Governments around the world. To know more, visit [www.mphasis.com](http://www.mphasis.com)

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