

WORKFLOW EFFICIENCY

ONBOARDING ASSOCIATE

Frictionless Agent Onboarding



THE HIDDEN COST OF INEFFICIENCY

Manual licensing verification and contracting paperwork delay your ability to activate new agents, costing you lost revenue capacity.

YOUR DIGITAL WORKFORCE

The Onboarding Associate: Scale your distribution network instantly with an AI Associate built for licensing automation.

AGENTIC BUSINESS RESULTS (ABR) DELIVERED

- **Streamlined Intake:** Automated agent intake with licenses verification and contracting form management.
- **Speed to Market:** Reducing the time-to-sell from weeks to days.



PROVEN ARCHITECTURE, ABSOLUTE CONTROL

COMPLIANCE BY DESIGN

The Human-in-the-loop Differentiator: We treat AI as a collaborative tool. Our human-in-the-loop architecture actively enforces moment-by-moment integrity and NAIC AI Model Bulletin compliance. When ambiguous, the AI queues a response for human review, providing a transparent trail of decision-making.

INCONTROVERTIBLE MARKET VALIDATION

This divestiture of Eventuard structurally de-risks our offering for institutional partners, proving our AI Associates function reliably in highly regulated, live production environments.

TECHNICAL VALIDATORS

- **Compliance:** Our human-in-the-loop architecture actively enforces moment-by-moment integrity and NAIC AI Model Bulletin compliance. When ambiguous, the AI queues a response for human review.
- **Validation:** We approach the market with incontrovertible market validation: the successful creation, scaling, and sale of our fully digital MGA, Eventuard. AI Associates completed over 90% of transactions from quote to bind entirely without human intervention.
- **Technical Validators:** Production-ready in ~60 days. Insurance-Native Architecture understands binding authority. API-First Integration with AMS/PAS. Strategy Studio empowers no-code control.



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