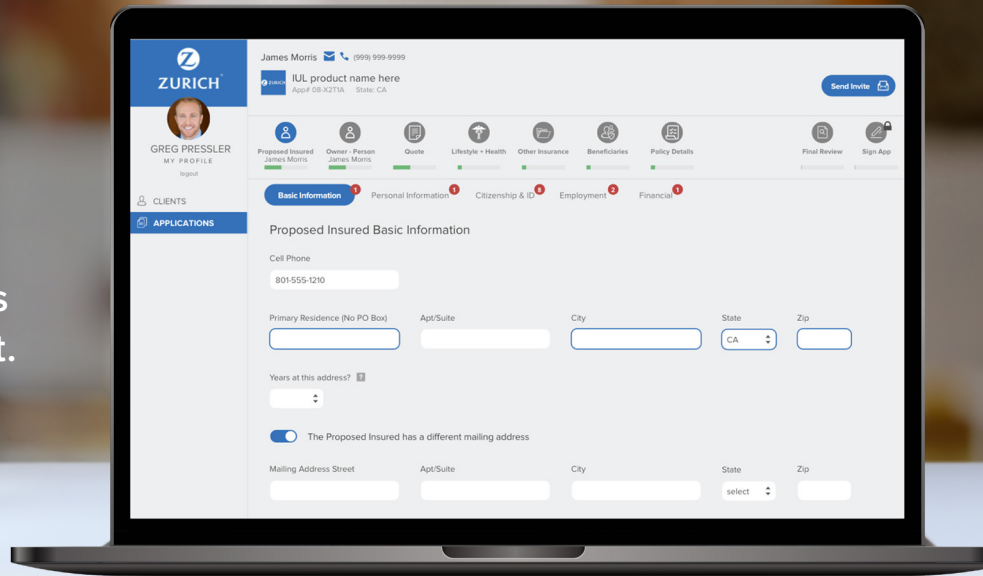




Porch Software's Built-in Platform

Built for independent advisors
working in the affluent market.



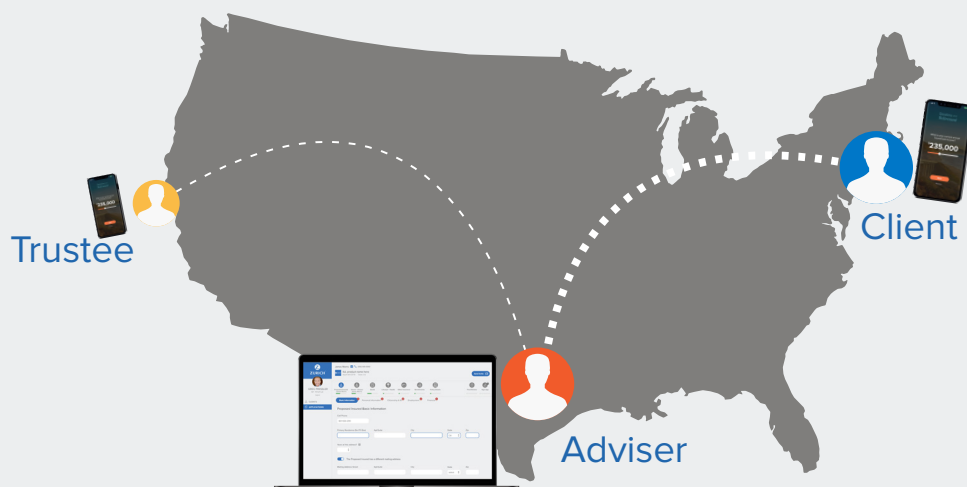
Core Features

Remote Experience

Porch has a truly unique remote experience that ensures 100% accuracy. Gone are the days of transcribing complicated data points and personal information found throughout an application. Simply click the invite client button, at any time, to instantly send an invitation to the client's inbox. Within seconds, they can clarify and update any information on their own. This information transfers seamlessly between the client version of the application and your version. Allowing you to manage multiple applications at once; from anywhere you need to be.

Client Side

We have designed an entire client facing version of Porch with one goal in mind: ease of use. It is a guided experience with questions presented one at a time. Any info they fill out in the client side, will automatically translate to your version. Eliminating any input errors or confusion.



Platform Configurations

- ✓ All Life Products
- ✓ Trust & Entity Owned Policies
- ✓ Multiple Owners
- ✓ Full Delegate access and application submission
- ✓ Replacements/ 1035 Exchanges
- ✓ Supplemental Forms

Auto-Populated Fields

Every feature we design at porch is focused around speed and accuracy. Auto populated fields is one of our users favorites. Enter in info such as physician information, treatment centers, beneficiaries and other entities, financial details, etc only once. It is then saved and can be selected or automatically used in the rest of the application or any further application for that client.

DocuSign

Electronically sign documents with improved accuracy and less hassle. DocuSign guides your client and every signing entity to each page they have to sign. Get notified when they've completed the process or send individual reminders to parties that haven't signed.

Document Upload

Conveniently attach and manage any supporting document.

Help Line

We know how hard it can be to try something new, especially software, that's why we have a help line dedicated to guiding you through your first app. Call us between 9-5 and we'll be happy to help. Trained agents are standing by to answer any questions you may have.

Smart Fields

Porch Software scans every section for accuracy. Any information that is required by Zurich is marked for your convenience. With the final review tool you can check the entire application for any important fields you may have skipped and jump to that section to complete them.

Delegate Access

Securely hand over any application to anyone you please with our delegate system. Allowing you to focus on other clients or business.

Focus Tested

We love feedback at porch, and have improved and built our platform around the feedback we've received over the years. We have curated and crafted this experience around efficiency and ease of use. You are not a beta tester, thousands of good order apps have been run through Porch.

Tutorial Videos

We have created a tutorial suite to explain every major concept in Porch. Topic based, short videos to help you get an answer or grasp a concept in two minutes or less. The last thing we want any user to ask is, "what next?".

Our Mission

Having an honest conversation with a client is the essence of Porch Software. Individuals and families need life insurance. It protects the people we love the most in one of the most painful moments in our lives.

Our focus everyday is creating technology that makes that conversation and education around life insurance easier so more people buy and retain life insurance as the valuable asset that it is.

