Solutions for the Insurance Industry

Integrated & Cloud-Based Software Solutions

GFS

globalfundsolutions

Are you ready to take your insurance business to the next level? With Global Fund Solutions, insurance carriers and their agents are able to focus on what truly matters — serving their clients.

GFS Insurance

As a leading provider in insurance software and services, GFS has developed optimized tools to help your business become more efficient through automated policy and claims processing. *GFS Insurance* is a fully-integrated, cloud-based software solution designed to manage the needs of insurance carriers. It is configurable for multiple product offerings, currencies, states, and issue companies, which makes it an ideal tool for insurance carriers of any size. With the administration system, our users are able to:

- Manage policies

- Customize client services

- Service claims

- Identify producer information

- Initiate and monitor accounting requests

- Define investment details

- Generate reports

THE GFS ADVANTAGE

Improved Efficiency

No need for the user to log in into multiple systems. *GFS Insurance* gives you real-time access to policy, billing, claims and client servicing in one easy-to-use system.

Increased Productivity

With its real-time functionality and secure access, your agents can process endorsements, check on billing, get the status of a claim or quote 24/7 without having to make a phone call.

Reduced Cost

We offer a series of software modules within one suite that speak to each other – avoiding manual data input or even comparing records between modules. No more spending time and money on internal system integration.

GFS
globalfundsolutions

GFS Policy Management

In today's high-octane society, 'Time is money.' Agents are more apt to write business with a carrier who provides the appropriate tools to enable them to effectively sell policies and service their clients.

GFS Insurance allows agents to log into their own agency portal and instantly quote any insurance products offered by the system at any time of day. Based on the agent's authority access, they can independently create an application, rate different products and bind policies without involving the insurance underwriter in the process. Agents can easily assist their clients with real-time information, by checking account balances, printing invoices or policy documents, and updating mortgage information directly online. In just a few clicks, agents can submit endorsements and post payments to their client's account.
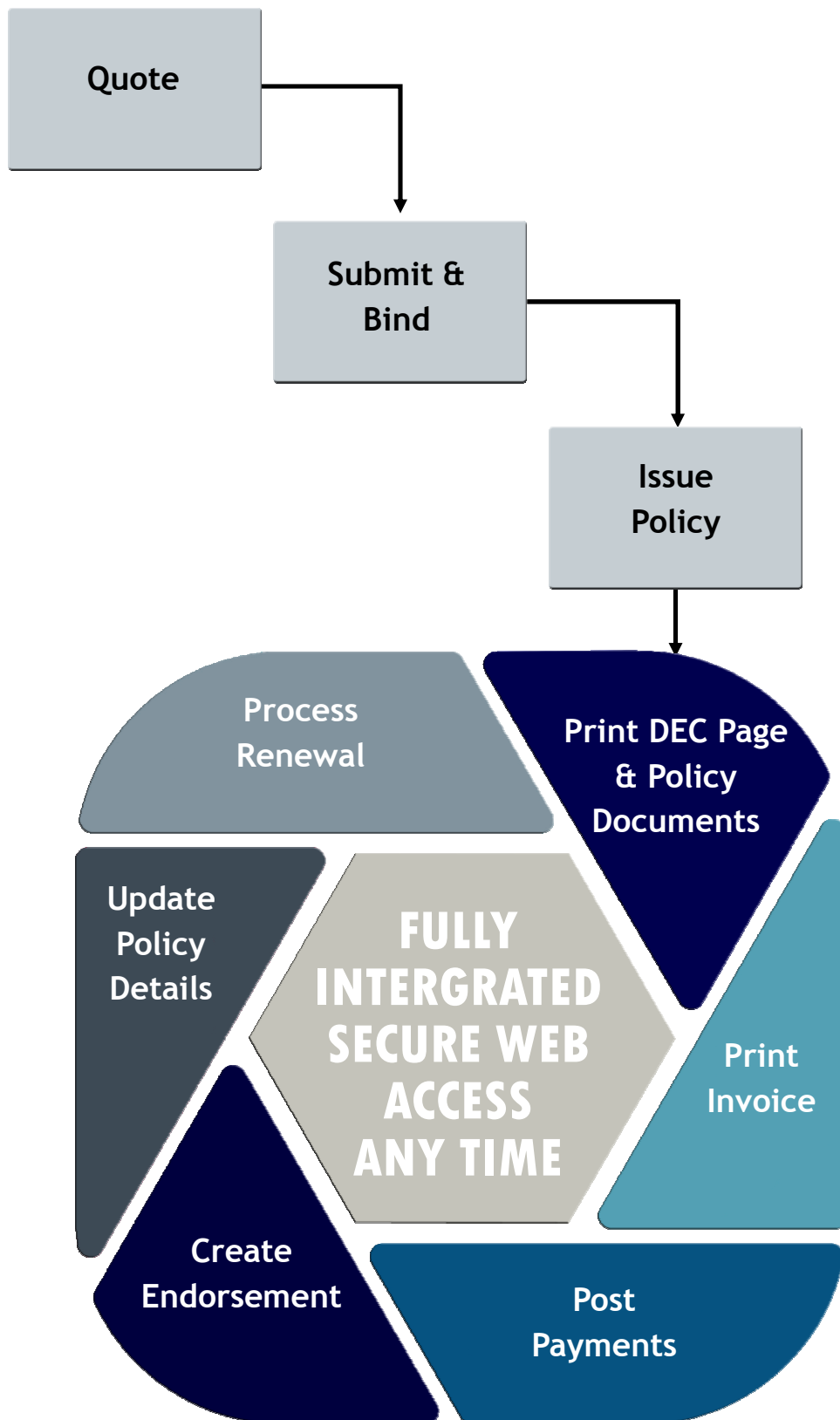
All transactions submitted by the agents from their web portal can be viewed, approved or modified by the underwriter at any time.

BENEFITS

- Increase efficiency
- Reduce service time
- Self-service capability for agents
- Real-time data information
- Available anytime, anywhere
- All-in-one system

GFS Policy Management

Quote

↓

Submit & Bind

↓

Issue Policy

↓

Process Renewal

Print DEC Page & Policy Documents

Update Policy Details

FULLY INTERGRATED SECURE WEB ACCESS ANY TIME

Print Invoice

Create Endorsement

Post Payments

GFS
globalfundsolutions

GFS Client Services

Carriers can manage all clients information using the *GFS Insurance* Client Service tool. Each client, whether they're a policyholder, agent, or mortgagee, is given a unique ID number and all pertinent contact information is available to view or edit at any time with just a few clicks.

GFS Claim Servicing

The *GFS Insurance* Claim Servicing tool gives claims personnel the ability to easily record, process, and manage claims. The claims management system verifies coverage information at the creation of a claim and pulls all relevant policy information needed by the claims department to successfully process the claim. An activity log lets adjusters and managers record any activities (calls, correspondence, inspections, and pictures) that are accessible to claims personnel 24/7.

FEATURES

- Verify coverage
- Provide policy information
- Uploads of pictures and correspondence
- Real time data
- Reserve & payment information

GFS Producer Management

Carriers have the ability to record, confirm, and store accurate producer records with the *GFS Insurance* Producer Management tool. Keep track of agencies and agents relevant information like address, phone numbers, contact information, tax id to further streamline your business's operations.

Users can maintain and manage producer records including licenses, appointments, line of business, authority level, agreements and contracts. Commission rates can also be set up individually and updated at any time by the insurance carrier. An upload function is also available to store important documents for viewing and printing at any time from any location.

BENEFITS

- All information in one central location
- Upload of important contracts and documents
- Real time data

FEATURES

- Multiple authority level
- Multiple line of business
- Customized commission rate
- Store license information
- Store FEIN Producer number

GFS Accounting

Using the Accounting tool in the GFS Insurance system, users can batch transactions to increase efficiency and time management. After users create accounting rules for the different transactions, debits and credits are stored in the appropriate sub ledgers, which makes invoicing and commission simple and easy.

GFS Investment

The GFS Portfolio Management module is capable of handling most investments from stocks & options to complex bonds. Investment transactions are posted to the accounting module automatically eliminating closing journal entries and reconciliations between the two modules. NAIC Schedule D reporting capability is standard with GFS Insurance.
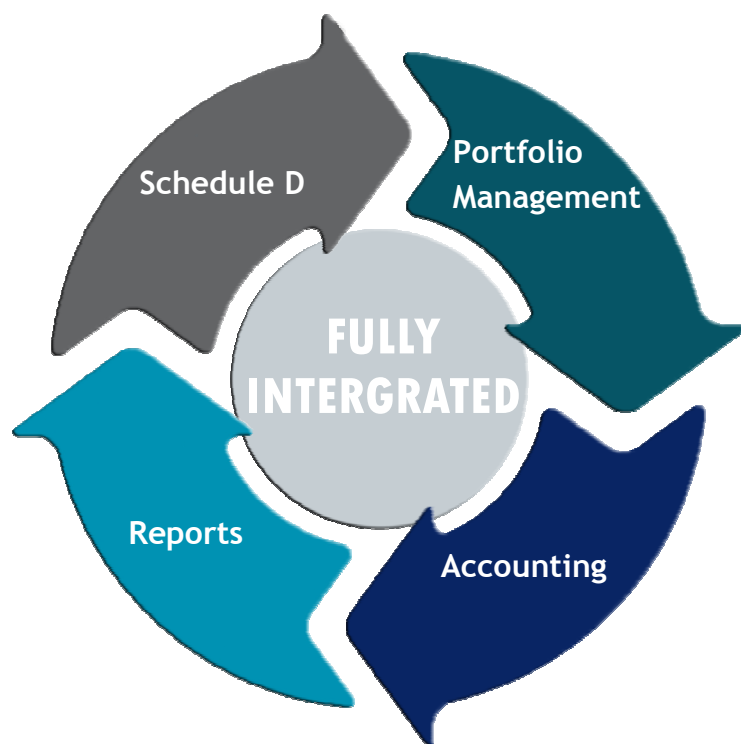
Global Fund Solutions is the insurance industry's leader in portfolio management, Schedule D, accounting, and performance reports. The GFS proprietary web-based integrated technology platform allows your company to actively manage your insurance investment portfolio by creating monthly financial statements and Schedule D reports.

PORTFOLIO MANAGEMENT

Investment transactions reporting made easy:

- Third-party data upload, brokerage accounts, pricing service, etc.

- Cash linked brokerage account to ease the cash reconciliation process.

- Add new securities, change coupon rates, and update pricing with ease.

- Reverse repo & securities financing tracking.

- Manage NAIC designation by securities for accurate Schedule D reporting.

GFS
global fund solutions

GFS Reports

In order to drive a business forward, data must be readily available.

The GFS Reports module enables carriers to make better use of their data. The standard reports within GFS Insurance are the most widely used in the industry for data analytics and accounting & reporting. In addition, ad hoc reports can be generated using Crystal Reports.

BENEFITS

- Crystal Reports Integration
- Customizable Reports
- Pre-loaded Reports Across All Modules
- Email or Download Reports in Any Format

SCHEDULE D

GFS offers Schedule D Reporting capabilities complete and ready to be included in your quarterly and annual NAIC filing. This includes:

- Part 1 – Long Term Bonds
- Part 2 – Preferred and Common Stocks
- Part 3 – Long Term Bonds and Stocks Acquired
- Part 4 – Long Term Bonds and Stocks Sold, Redeemed or Disposed
- Part 5 – Long Term Bonds and Stocks Acquired and Fully Disposed

GFS
global fund solutions

GFS Insurance integrates third-party technologies to enhance the functionalities of our software. These vendors provide valuation & pricing services, risk information, payment processing, and more. A separate contract or subscription may be required for certain third party information or services. The following table lists some of the third -party vendors currently configured into GFS Insurance. Others can be integrated seamlessly to meet your requirements.

Some of these services require independent service contracts with the vendor to use the service.

3rd Party Technology	Version
MySQL	5.5.27
Apache HTTP Server	2.4.4
Apache Tomcat	6
PHP	5.4.3
I-Report	5.0.0
Windows OS	2008 R2
pdftk	2.02
Php Java Bridge	1
Memcache	svn20120301-5.4-VC9-x64
Jpedal	5.14b28
Slim CD	
hMailServer	5.3.3.B1879
CakePHP	1.2.2
ISO 360	
My-SQL-Front	5.3
HeidiSQL	8

GFS
globalfundsolutions

GFS About Us

Global Fund Solutions offers comprehensive end-user training and continual support for our clients. We understand each clients' needs are different with multiple offices and end-users worldwide. For this reason, we maintain highly flexible training options and schedules to ensure that each end-user is comfortable with all aspects of our software.

- In-person guidance—If time is of the essence, this is the most effective way to train end-users. Interactions between our experts and end-users often leads to a more thorough understanding of the software and its capabilities.

- Phone and web-based guidance—A formal software walk through is presented by our experts, then followed by a Q&A session.

- Comprehensive Tutorial CD and web downloads— This option allows end-users to learn at their own pace. These tools can also be used as a refresher and on-going reviews.

GFS is committed to our client's success by providing cutting-edge software and unsurpassed service & support. We endeavor to be your software company of choice by applying diligence, responsiveness, and integrity into everything we do.

OUR PLEDGE

GFS
globalfundsolutions

GFS
globalfundsolutions

1101 E. Cumberland Ave. Suite 300

Tampa, Florida 33602

Within US: 800.339.5729

Outside US: 813.514.0332

Fax: 813.289.8849

www.globalfundsolutions.com   info@globalfundsolutions.com

GFS Insurance

One Integrated Solution.

Multiple benefits.