



Vertafore™

Unleash your potential

FinancePro®

FinancePro Features

- Insureds can view account status and make ePayments online
- Send email and fax notices to agents and insurance carriers to save money on postage, paper and handling
- Agents can view account status or create quotes online instead of calling you
- Automatically store signed finance agreements as images for online viewing
- Configurable user and security controls
- Specify minimum down payments and number of installments allowed based on agency, coverage type, premium amount and cancellation terms
- Reports are designed to protect your company against fraud

A comprehensive web-based premium finance management solution.

If you want to efficiently run your premium finance company, you need Vertafore® FinancePro—the easiest and most feature-rich premium finance software on the market. Best of all, it's web-based, so there's no hardware to buy and maintain and no software to install. Additionally, our experienced staff will train you and have you running your own finance company in no time.

Gain a Competitive Edge with Premium Financing

Easy to get started

Simply log in, customize your site, set up rules, enter users and your finance business is ready to go. There's no software to install, no hardware to configure and no IT personnel necessary.

Cost effective

You pay monthly, based on the number of loans you have, rather than paying large up-front fees for software that will quickly become obsolete.

Log in anytime, anywhere

Because FinancePro is web based, you can log into the system from anywhere. You can access reports, create new quotes, look up account status and access all other features when you're at home, in the office or on the go.

Integrates with agency software

Using the Prevail Network, FinancePro fully integrates with AIM® and AMS360®. Agents can create quotes directly from their management system, and once accepted the quote will be automatically created as an account in FinancePro.

Entirely web-based

Agents can check live account status online and enter quotes directly into the system. Email notices, XML integration and an easy-to-use, user interface make FinancePro your complete online solution.

More Convenience with Online ePayments

Improve customer service

Stay competitive with a wide range of payment options. Insured can make payments online 24 hours a day, 7 days a week, at their convenience.

Increase profitability

Online ePayments remove the administrative resources needed to process statements, coupons, checks and cash. By accepting credit cards online, you enable instant payments and get paid fast.

Flexible payment options

FinancePro allows you to receive payments via ACH, checks, lockbox, credit cards, or online via ePayments. You can bill your insured using monthly statements, coupons or ACH.

Total Financing Solution

With reports, notices, payment processing, quoting and account status, and compliance in all 50 states, FinancePro has everything you need to run a successful premium finance company.

To find out how FinancePro can help you gain a competitive advantage, contact your Vertafore account manager at 800.444.4813.

“FinancePro is a proven web based system for helping us manage our premium finance receivables. Our agent/broker clients regularly comment that FinancePro is intuitive and user friendly for generating premium finance quotes, looking up accounts and running reports. And the insureds appreciate the ability to check their real time account status and to make their payments online.”

— Luther J. Grafe, Senior Executive Vice President & COO, BankDirect Capital Finance

Vertafore is the leading provider of software and information to the insurance distribution channel, including independent agents, brokers, MGAs, carriers and reinsurers. Vertafore leverages a unique industry presence to deliver meaningful solutions—powerful technology, critical information and robust insights to help organizations effectively respond to business challenges and capture new opportunities. Vertafore solutions are helping more than 17,000 customers and 500,000 end users gain a competitive advantage to accelerate their business performance.

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