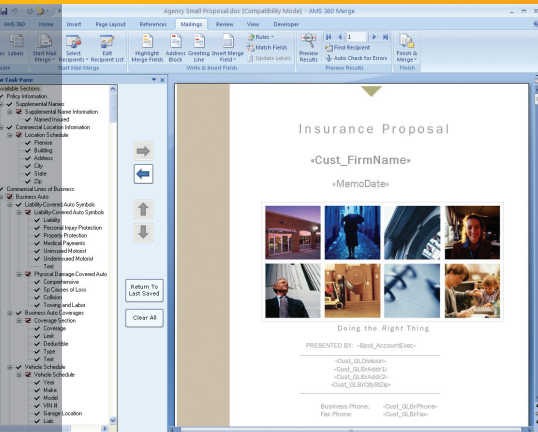




**Vertafore™**

Unleash your potential

# AMS 360® Version 4.0



- Available as a web-based solution offering convenient online access from your web browser, or as an inhouse application
- Simplifies billing, endorsement processing, and quoting with oneclick access to carrier systems
- Integrates with TransactNOW and other rating software to streamline communications with carriers
- Seamless point-and-click integration with Microsoft Outlook® eliminates toggling between multiple applications to complete common tasks
- Features a powerful insurance accounting system that makes it easy manage all financial aspects of your agency
- Reduces errors and omissions by tracking document history to see who viewed, updated, and attached documents to activities
- Easily integrates with the Prevail Network for access to competitive real-time quotes from premium finance companies
- Includes automatic membership in the AMS Users Group, a valuable resource for networking and sharing with other agencies
- Microsoft SQL 2008, Microsoft Windows Server 2008 and Windows 7 Compatibility Certification

**Technology for the insurance industry is evolving rapidly. You need a management system that helps take your agency forward.**

AMS 360 is a modern agency management system, available in-house or online, that enables agencies of any size to improve productivity and connect with carriers efficiently, giving you more time to focus on customer acquisition and growth.

Streamlining processes to increase productivity and efficiency has always been important in your agency. You also want to continue to build your book of business, especially as the economy shifts. AMS 360 delivers the technology and performance to give your agency an edge in retaining and growing customer business.

## Everything you need to Build your Business

As the most advanced and cost-effective management system for independent insurance agencies, AMS 360's powerful tools streamline workflow, improve productivity and provide a complete view of your business. Once you simplify and automate your most common processes, less of your time is spent on tedious, time-consuming tasks, so you can offer the best for your customers—without adding staff.

## AMS 360 version 4.0 Simplifies Marketing and Sales Tasks

### DocDesigner Streamlines Proposal Creation

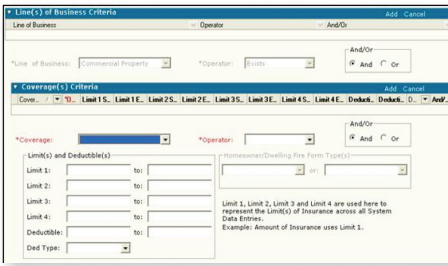
You can create customized schedules and proposal templates

in the familiar Microsoft Office 2007 interface from your AMS 360 system data with the DocDesigner feature, pictured on the left. This unique feature makes it easy to create polished documents quickly and easily and to save them as templates so that your producers and CSRs can quickly create professional-looking proposals. DocDesigner is intuitive and easy to use, which makes proposal creation much faster to help you with new business projects.

### Enhanced Target Lists Boost Marketing Efforts

If your agents need to cross market products and remind clients about adding more coverage, the Enhanced Target Lists feature allows you to pull a list of customers to market to, based on liability limits and deductible type.

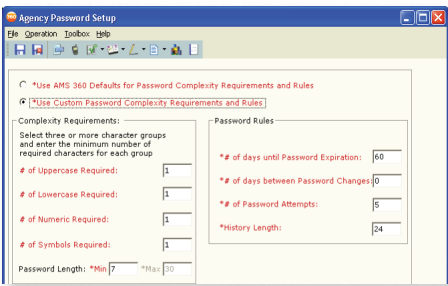
For example, you could use the new Limits and Deductibles section in the Coverage Criteria to pull a list of agency customers with a high limit on their homeowner's policies of \$3 million dollars—so you can cross-market other insurance products to these high net worth individuals and increase business.



Enhanced Target Lists feature lets you pull customer lists based on liability limits and deductible types.

### Agency Password Setup Keeps you in Compliance

AMS 360 supports your agency's security policies with Agency Password Setup which allows system administrators to set and enforce complex password requirements. This feature helps you comply with stringent state and federal data security and privacy laws.



Agency Password Setup helps your agency comply with strict data security and privacy laws.

### Compatibility Certification with Microsoft SQL 2008, Microsoft Windows Server 2008 and Microsoft Windows 7

Software isn't just about the features you can see. AMS 360 takes

**"I'm a total convert to AMS 360. We're far more efficient, sales are up, and we're doing it all with less staff. I just love this system."**

— Don Taylor, President, Bennion Taylor Insurance, Murray, Utah

advantage of the latest technology for improved performance, scalability, security and usability.



Microsoft SQL Server 2008 provides the highest levels of security, reliability and scalability for your business-critical applications, and reduces time and cost of management and development of applications. Microsoft Windows Server 2008 R2 is capable of unprecedented workload size, dynamic scalability and across-the-board availability and reliability.



**Windows 7 Compatibility Certification**  
AMS 360 4.0 has been certified compatible with Microsoft Windows 7, so when your agency makes the move to new Windows 7 workstations, your AMS 360 management system will work smoothly with the new Windows platform.

### AMS Scalability Allows for Business Growth

In a recent independent report from SMA Strategy Meets Action research, AMS 360 was shown to have "the ability to scale to serve a wide spectrum of agencies. Its architecture on Microsoft .NET and embrace of Web Services should enable Vertafore to expand and extend functionality. Connectivity to its suite of applications may be attractive to agencies that would prefer to buy from only a few vendors."

The complete report is available on Vertafore's Web site at: <http://www.vertafore.com/smaanalisys>.

For more information on how AMS 360 provides everything you need to grow your business, go to [www.vertafore.com](http://www.vertafore.com).

Vertafore is the leading provider of software, services 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 15,000 customers and 200,000 end users gain a competitive advantage to accelerate their business performance.

