



Insurance Advisory Application Presentation

Web | Mobile apps | eCom | BPM | Digital Marketing



Smart Insurance Advisory Management Platform

Manage Clients, Insurance Policies, Claims, Renewals, Communication, Billing, Team Collaboration, and Advisory Operations — Under Your Own Brand.

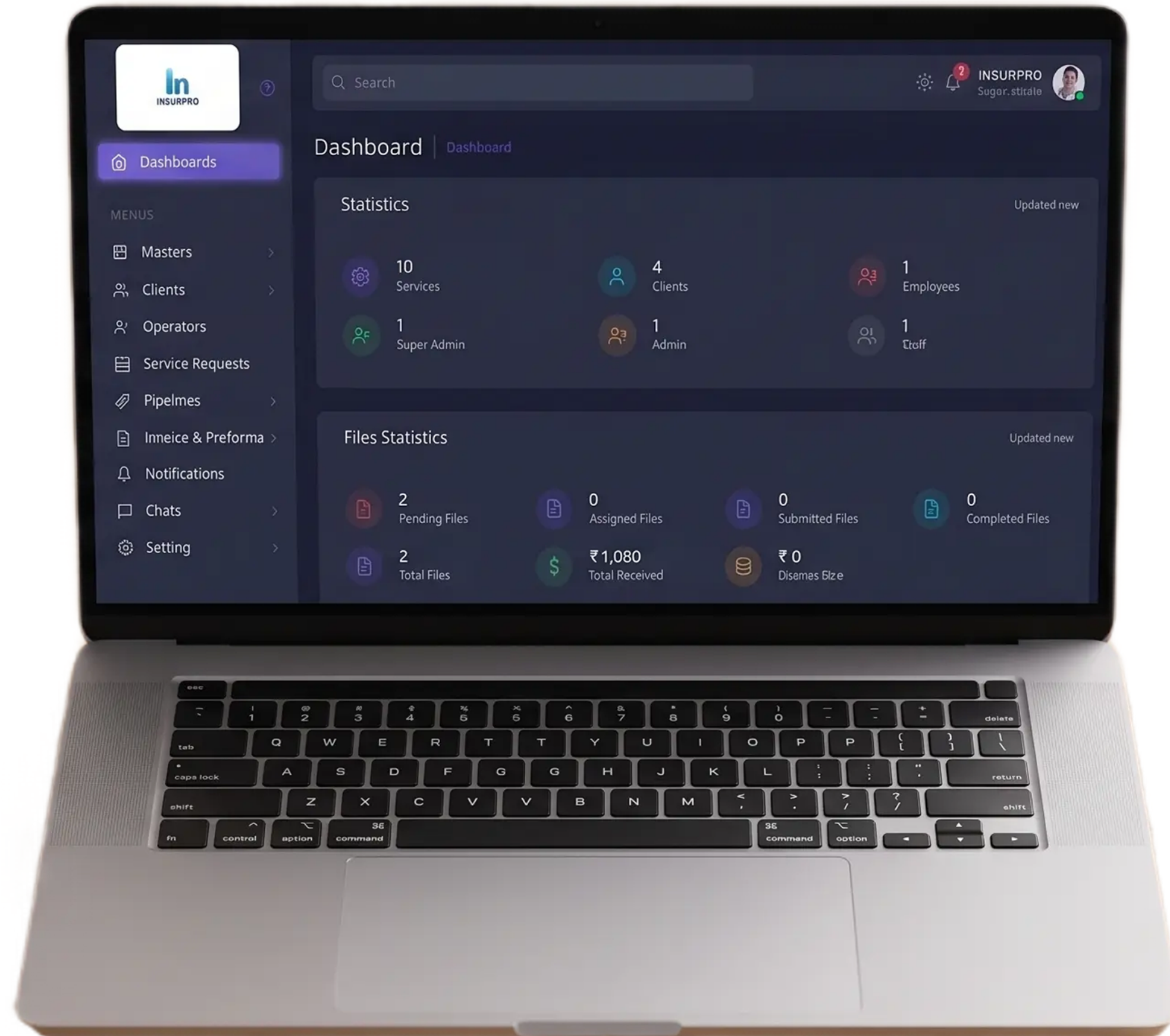
Web Application | Android App | iOS App

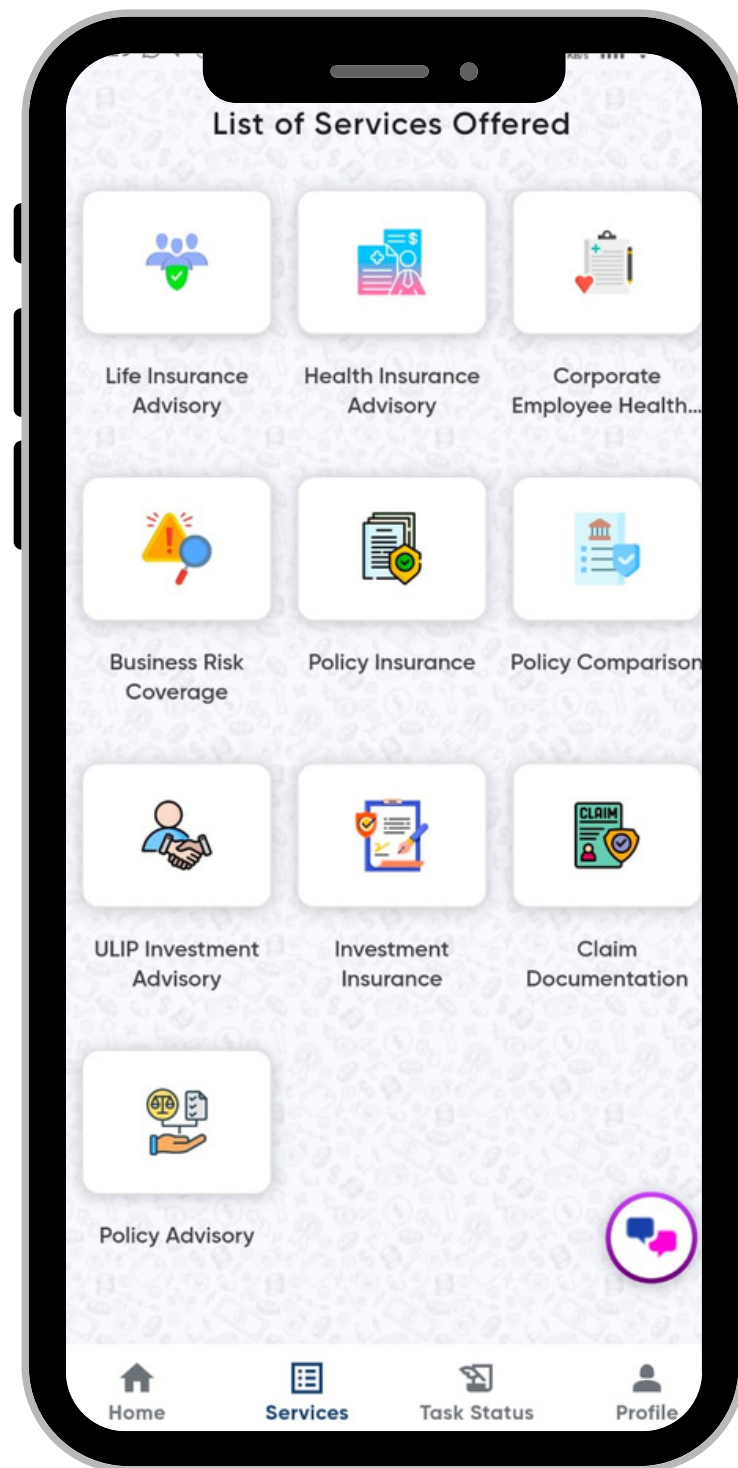
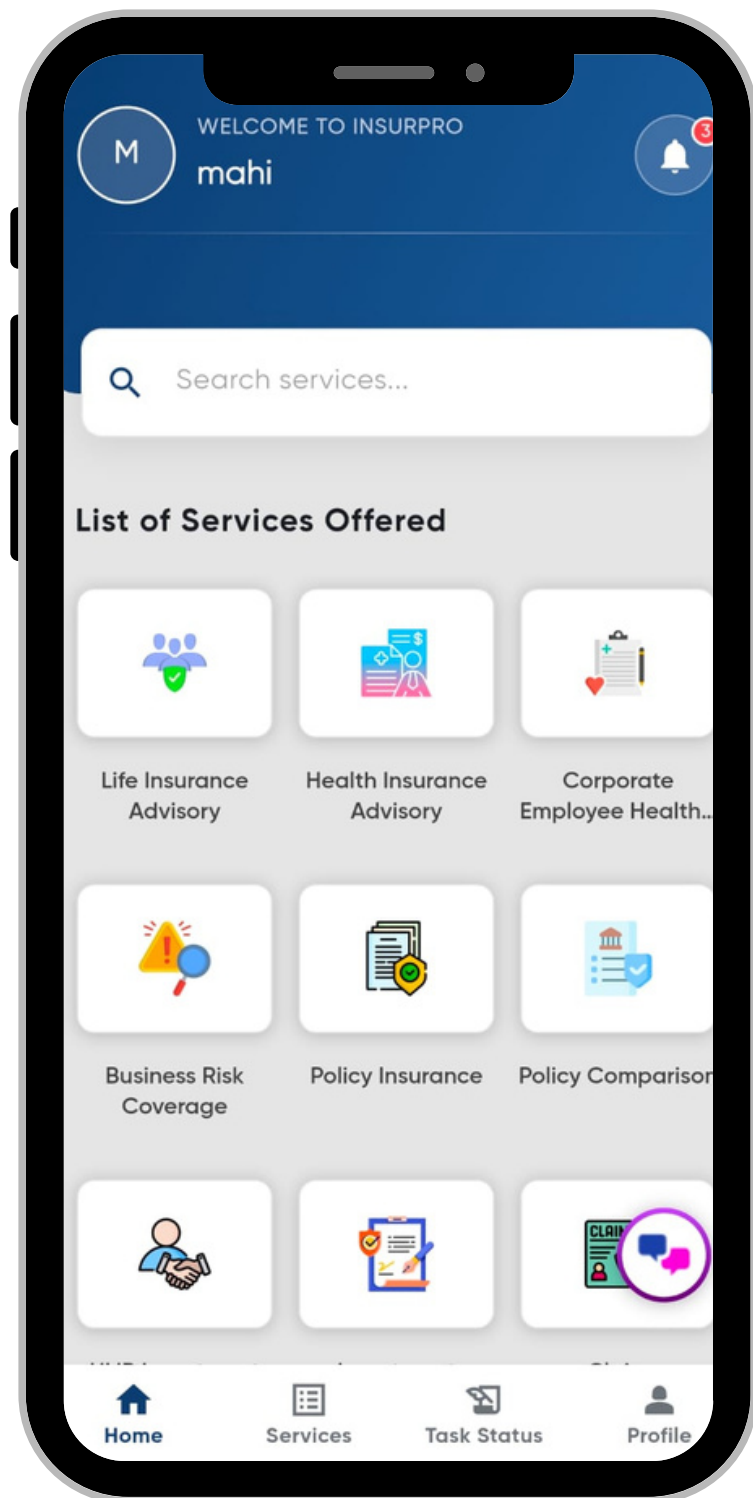
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What is Insurance Advisory Application?

Insurance Advisory Application is a comprehensive digital platform designed for insurance advisors, agencies, and brokers.

- Client Management
- Policy Management
- Insurance Advisory
- Claims Management





Who Is It For?

Designed for Modern Insurance Professionals

Insurance Advisory Application is ideal for insurance advisors, insurance agencies, brokers, corporate insurance consultants, policy service providers, and organizations managing multiple insurance portfolios.

- Insurance Advisors
- Insurance Agencies
- Insurance Brokers
- Corporate Insurance Consultants
- Health Insurance Advisors
- Life Insurance Consultants

General Insurance Service Providers Insurance Marketing Firms

Insurance Advisory Firms — Service List

Core Insurance Services

- Life Insurance Advisory
- Health Insurance Advisory
- Motor Insurance
- Business Insurance
- Property Insurance
- Liability Insurance

Corporate Insurance Services

- Employee Health Insurance
- Group Insurance
- Business Risk Coverage
- Asset Insurance
- Profit & Loss Preparation
- Professional Liability Insurance

Policy Management Services

- Policy Issuance
- Policy Renewals
- Policy Comparison
- Policy Advisory
- Premium Management

Insurance Advisory Firms — Service List

Claims Support Services

- ▶ Claim Filing
- ▶ Claim Tracking
- ▶ Claim Documentation
- ▶ Claim Settlement Support

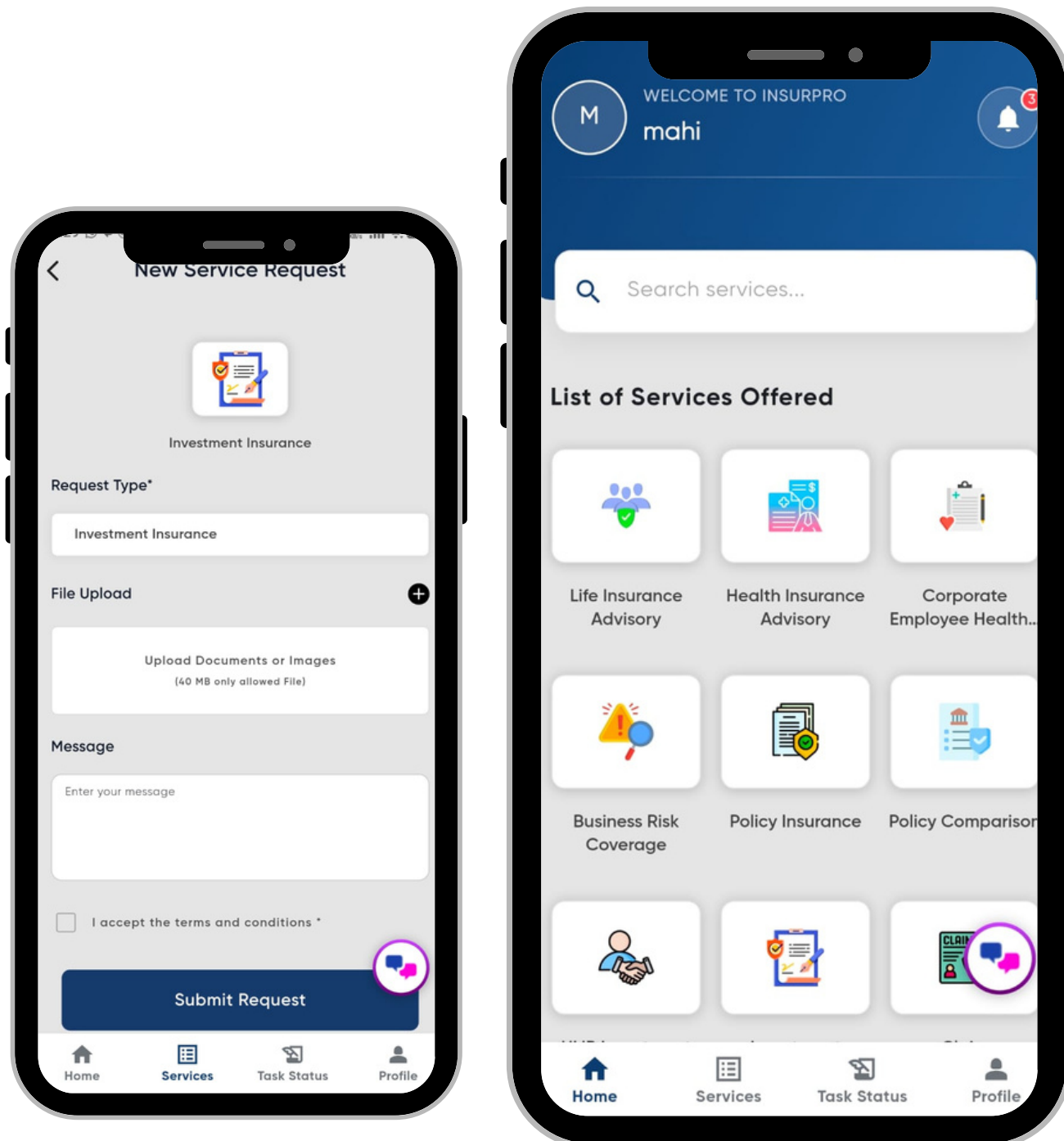
Financial & Investment Insurance

- ▶ ULIP Advisory
- ▶ Retirement Planning
- ▶ Pension Planning
- ▶ Child Plans
- ▶ Investment Insurance

Common Challenges

Operational Challenges in Insurance Advisory

- Managing multiple client policies
- Missed renewal deadlines
- Manual policy tracking
- Claims follow-up delays
- Document management issues
- Customer communication gaps
- Premium collection follow-ups
- Team coordination challenges
- Manual reminders



The Insurance Advisory Solution

Insurance Advisory Application helps manage

- ▶ Client Management
- ▶ Policy Management
- ▶ Insurance Advisory
- ▶ Claims Processing
- ▶ Policy Renewals
- ▶ Premium Tracking
- ▶ Billing & Invoicing
- ▶ Document Management
- ▶ Notifications
- ▶ Customer Communication
- ▶ Reports
- ▶ Team Management



Flexible Insurance Service Management

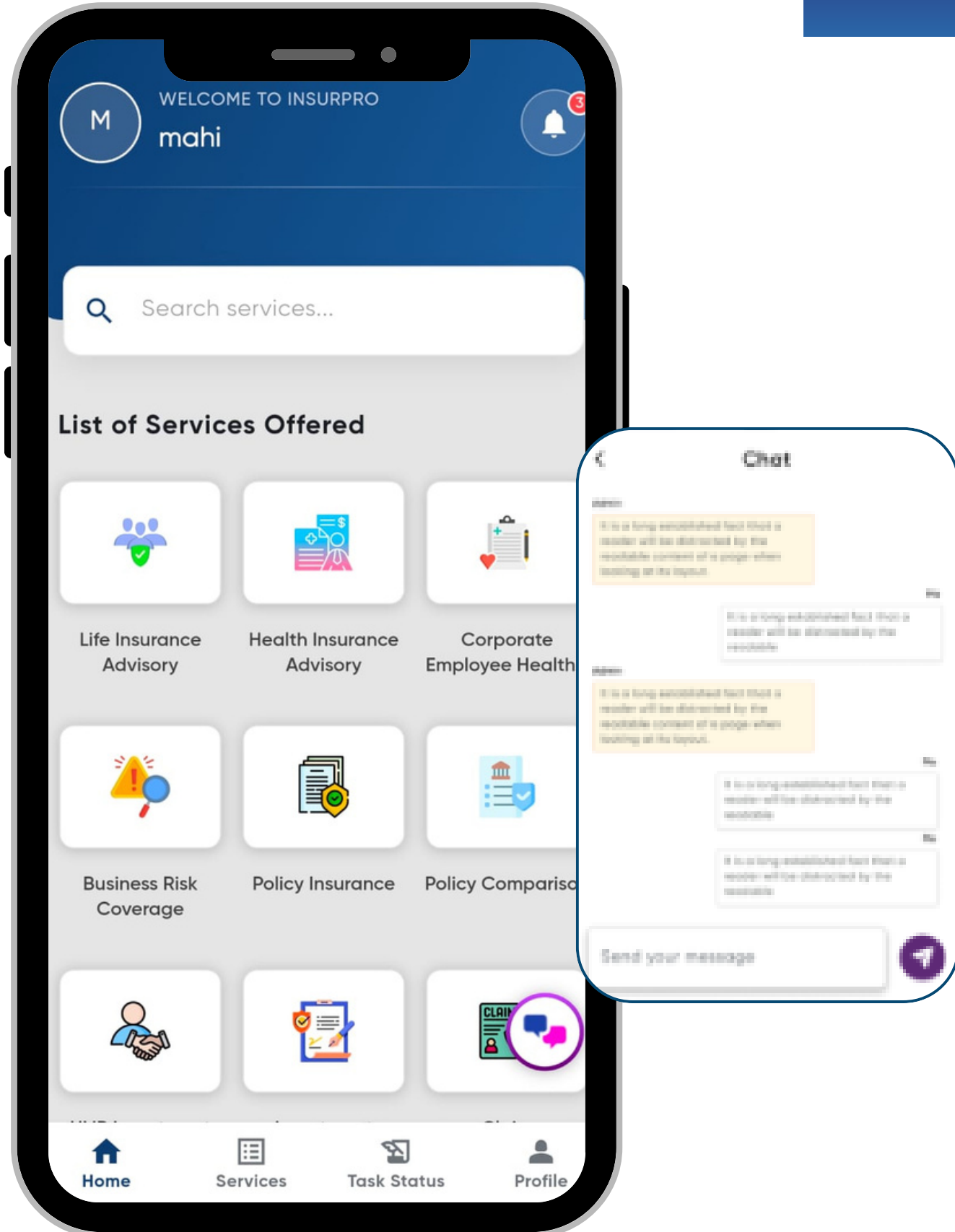
Configure insurance services based on your business.

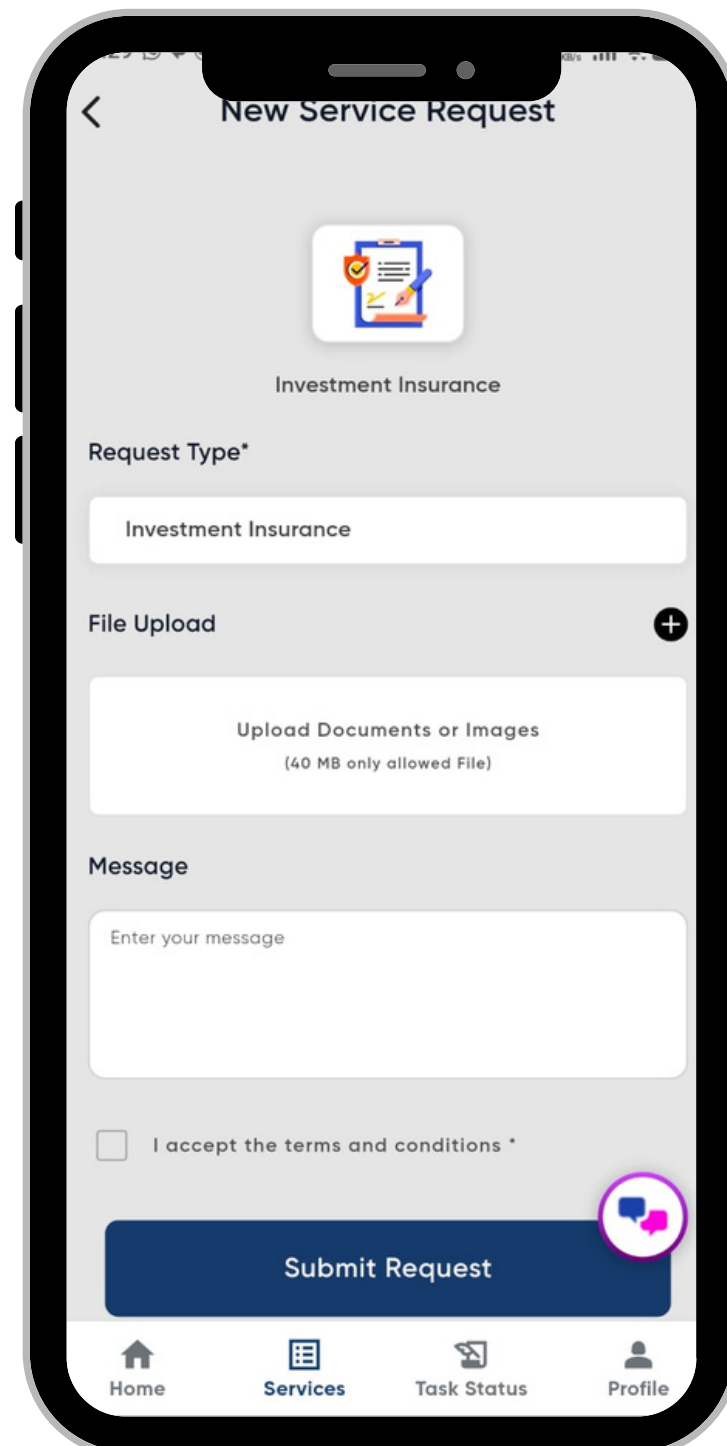
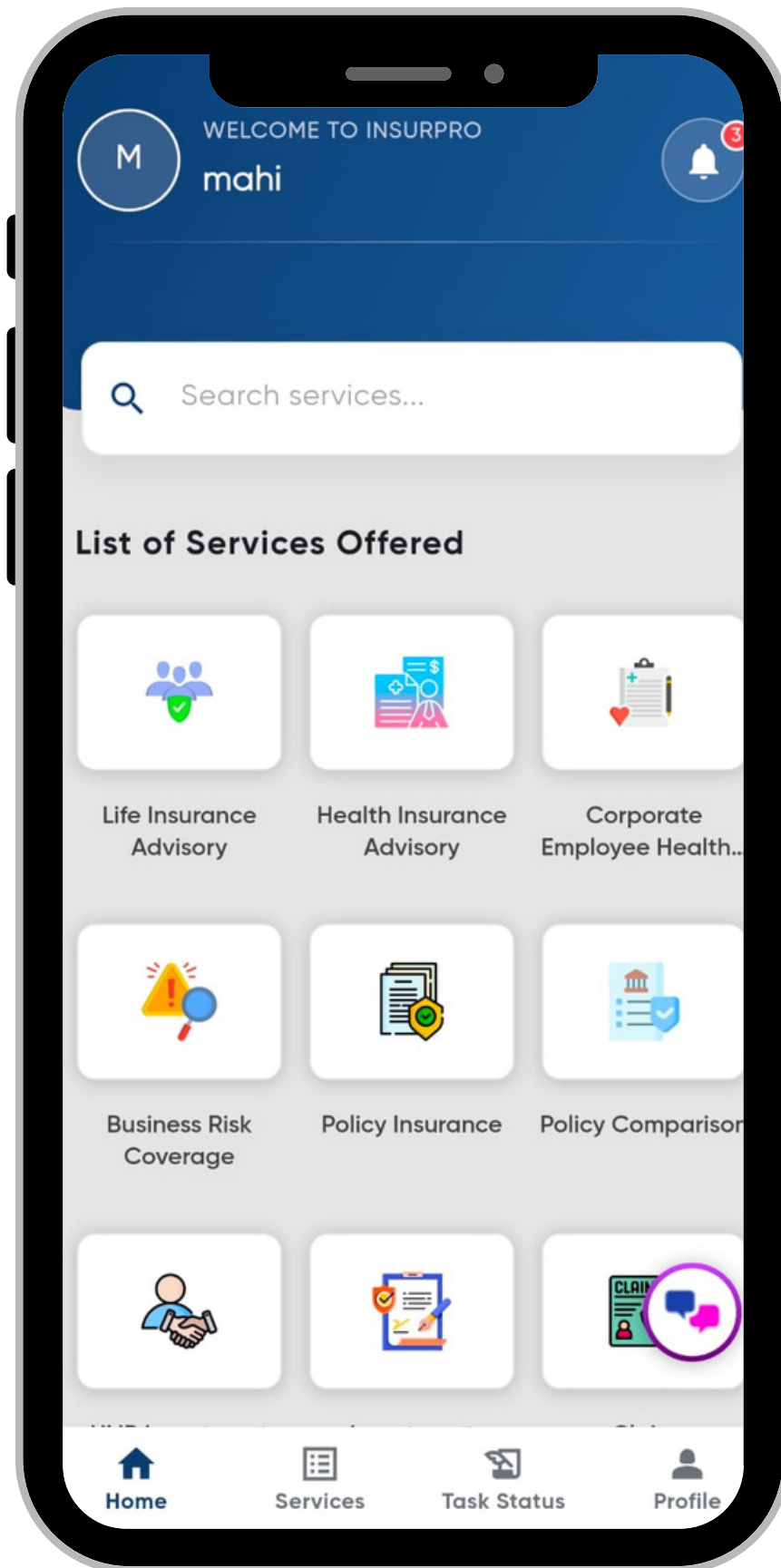
Core Insurance Services

- Life Insurance
- Health Insurance
- Motor Insurance
- Travel Insurance
- Personal Accident Insurance
- Property Insurance

Corporate Insurance Services

- Employee Health Insurance
- Group Insurance
- Business Liability Insurance
- Fire Insurance
- Asset Protection
- Commercial Insurance





Web & Mobile Experience

Access Anywhere, Anytime

Web Application

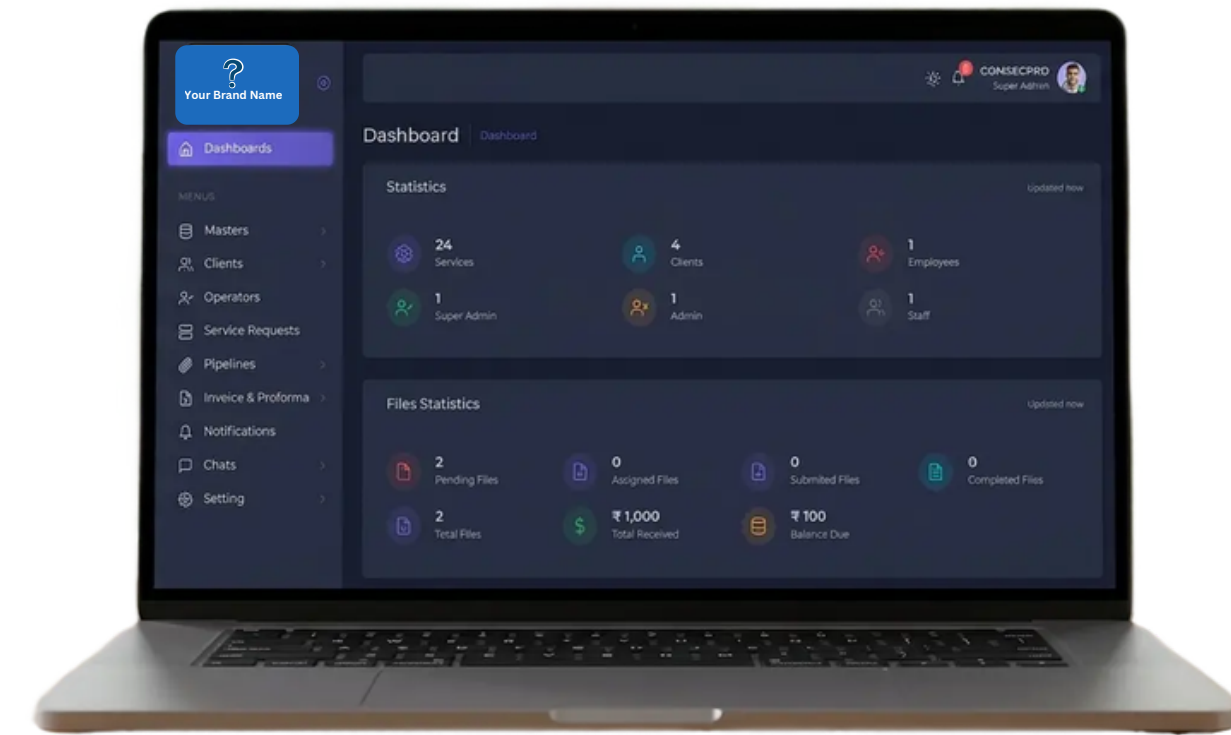
- Admin & Consultant Panel
- Client Portal
- Project & Task Management
- Consulting Workflow Management
- Document Management

Mobile Applications

- Android App
- iOS App
- Notifications & Alerts
- Client Communication
- Document Access

Your Own Branded Application

White-Label Branding



Own App Name

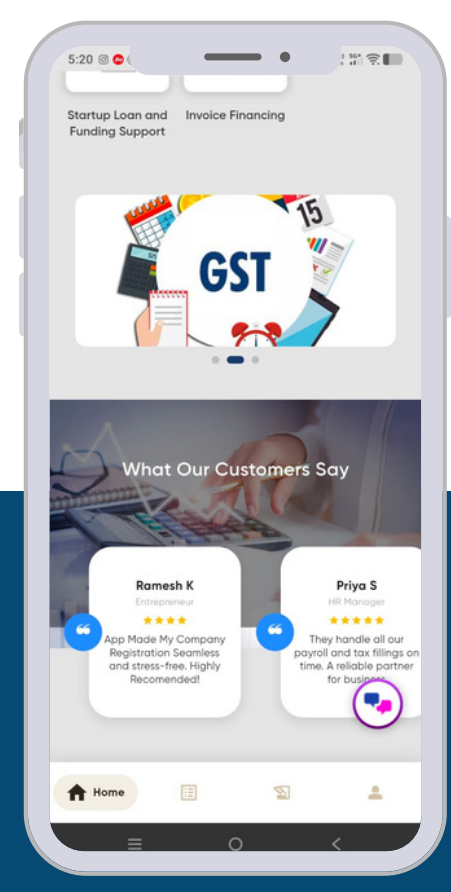
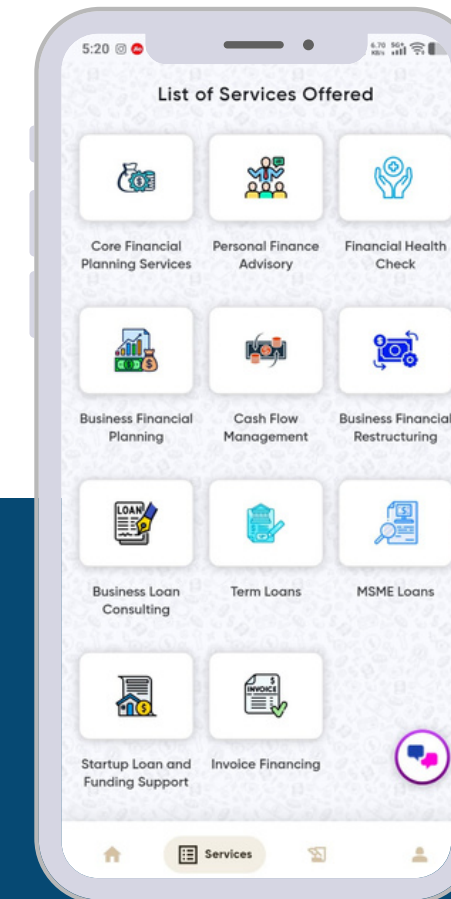
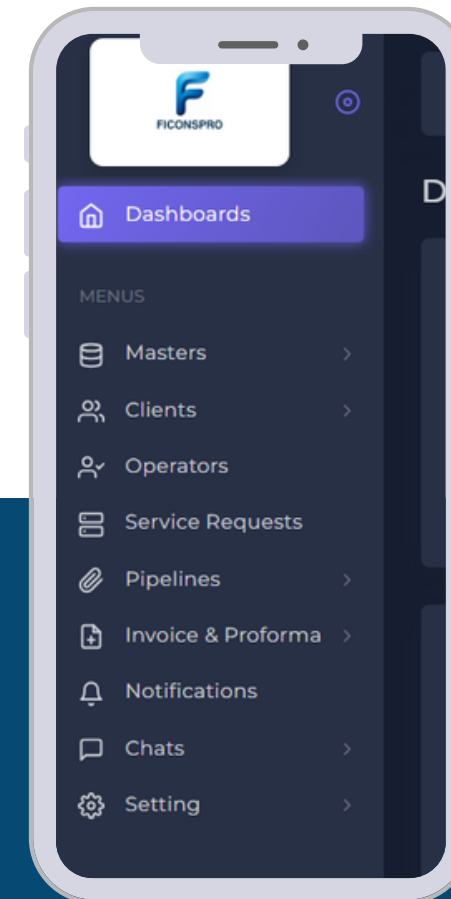
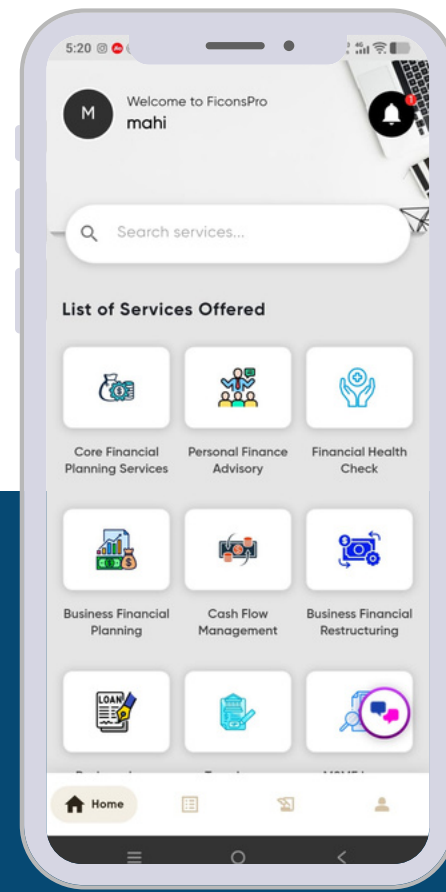
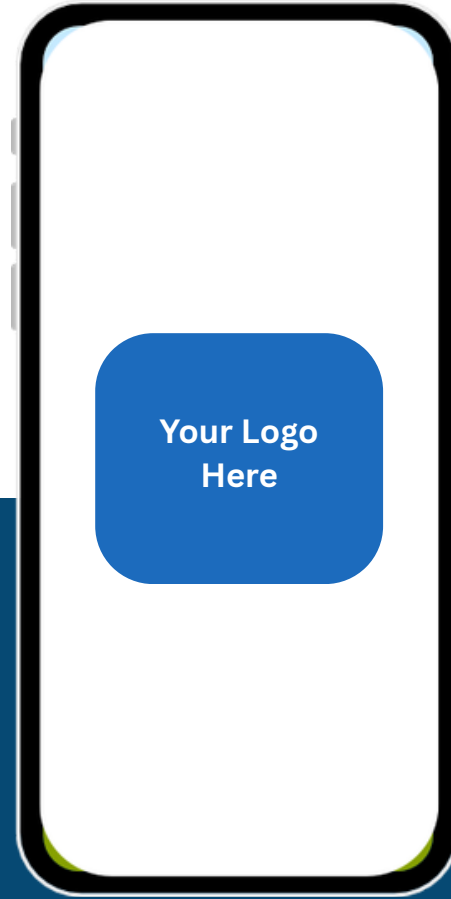
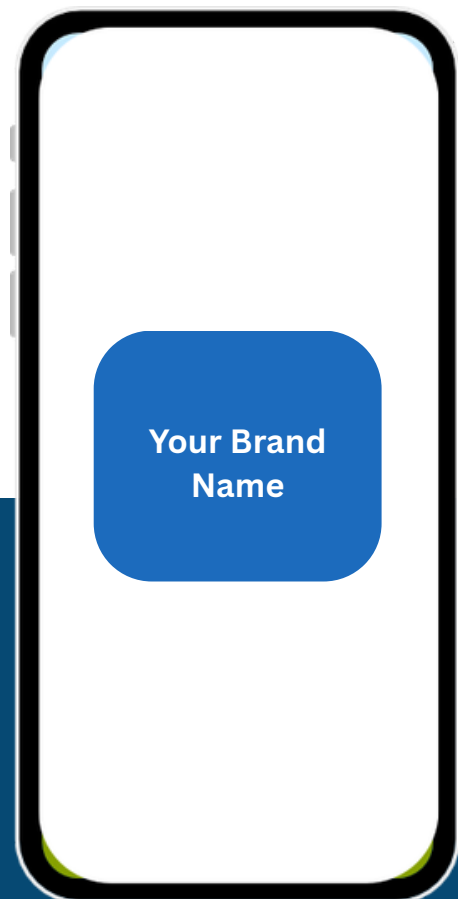
Own Logo

Own Brand Colors

Own Web Portal

Branded Android App

Branded iOS App



Your clients interact completely under your firm identity.

Build a Strong & Trusted Insurance Brand

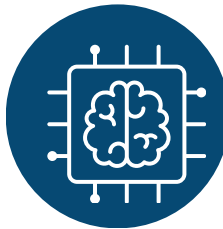
Deliver a modern insurance experience that strengthens your brand, builds client trust, and improves customer engagement.



Own branded web & mobile application



Improved client trust



Better digital identity

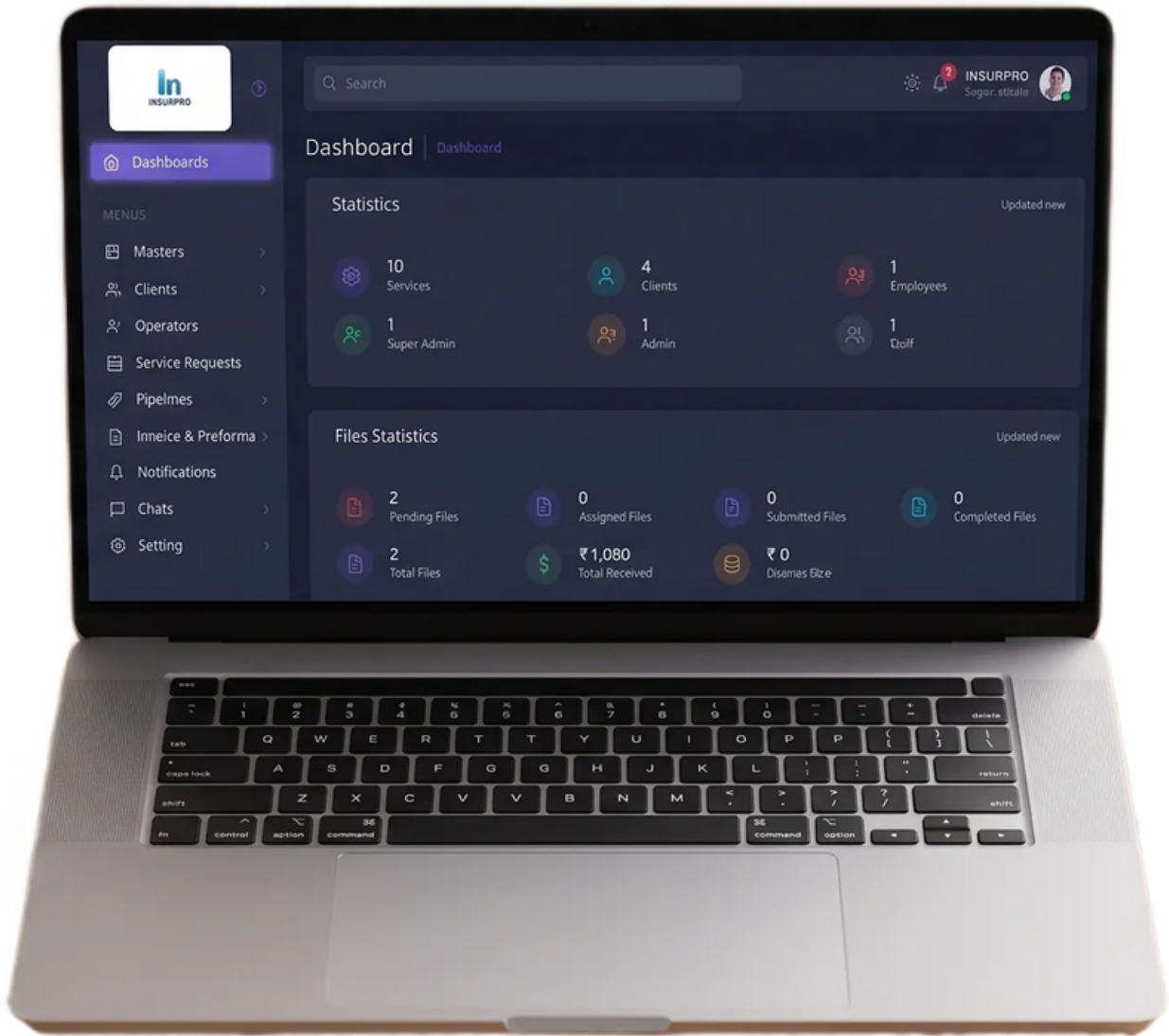


Professional communication flow



Modern client engagement experience

A branded application enhances both operational efficiency and professional credibility.

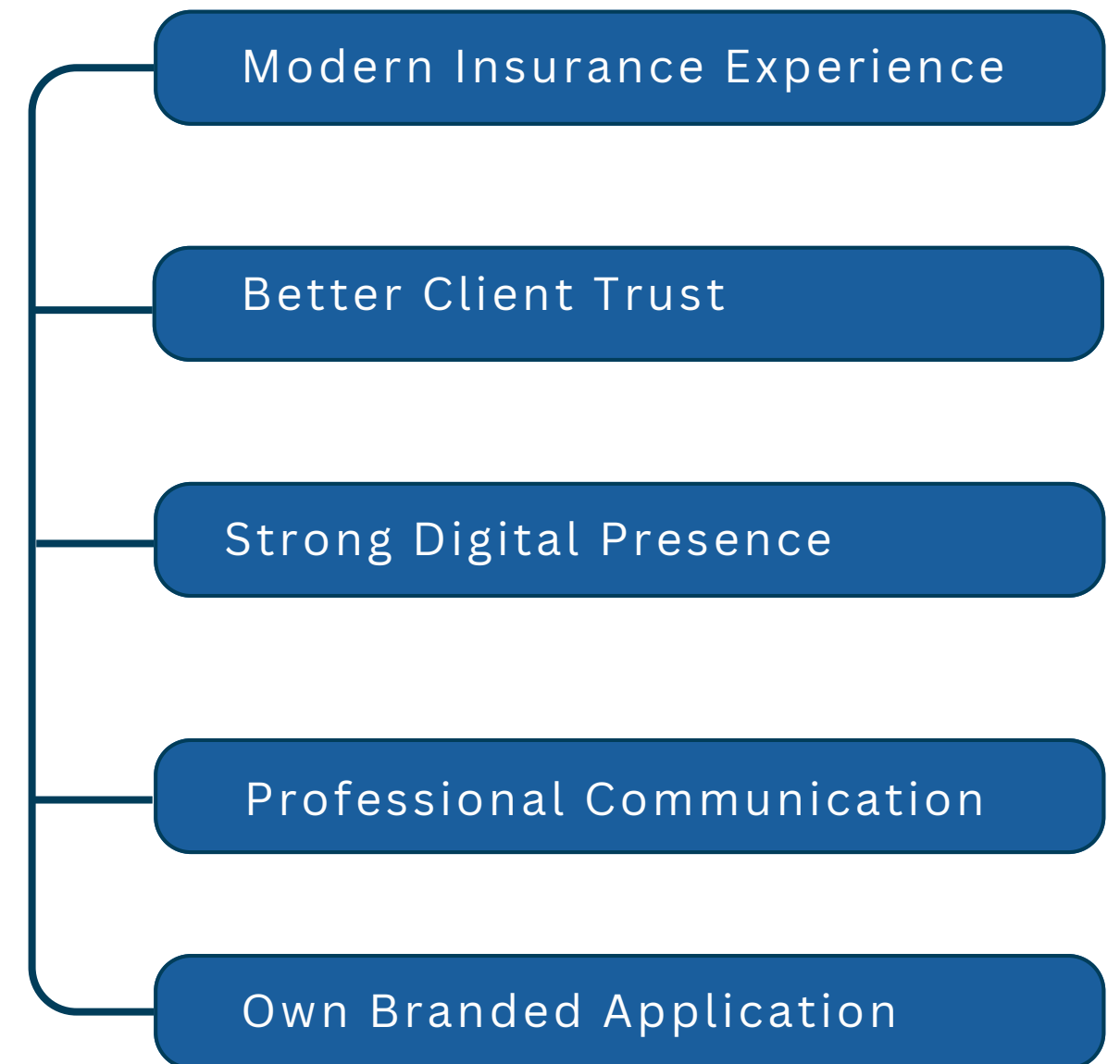


Build a Strong & Trusted Insurance Brand

Deliver a modern insurance experience that strengthens your brand, builds client trust, and improves customer engagement.



Build a Modern Digital Presence



Better Customer Experience

Enhance every customer interaction with a secure and user-friendly platform that simplifies policy management, claims tracking, renewals, and communication—building long-term trust and loyalty.

- View Policies
- Track Claims
- Receive Renewal Alerts
- Upload Documents
- Make Premium Payments
- Chat with Advisors
- Download Policy Documents

Benefits

- Higher Customer Satisfaction
- Better Customer Retention
- Increased Renewals
- Stronger Client Relationships



Grow Your Insurance Business

Drive Growth with Smarter Insurance Operations

Insurance Advisory application

- 01** Customer Retention
- 02** Operational Efficiency
- 03** Faster Service Delivery
- 04** Business Growth
- 05** Team Productivity
- 06** Brand Value

Streamline daily operations, strengthen customer relationships, and improve service efficiency with a centralized platform that helps your insurance advisory business scale confidently and deliver exceptional customer experiences.

WHY NOT BUILD FROM SCRATCH?

Own Development Challenges

Building and maintaining your own application involves:

- High development cost
- Long Development Time
- Ongoing Software Updates
- Maintenance cost
- Continuous Maintenance
- Technical Hiring
- Security Risks
- App Store Management

Avoid the high costs, lengthy development timelines, and ongoing maintenance of building software from scratch. Get a ready-to-use, scalable insurance advisory platform that lets you focus on serving clients and growing your business.





**MODERN TECHNOLOGY
EXPERIENCE**

MODERN TECHNOLOGY EXPERIENCE

BUILT USING MODERN TECHNOLOGIES

The platform is developed using:

- ▶ Laravel Framework
- ▶ Flutter
- ▶ React JS
- ▶ MariaDB / MySQL
- ▶ Cloud Infrastructure

This ensures:

- ▶ High Performance
- ▶ Enterprise Security
- ▶ Faster communication
- ▶ Scalability
- ▶ Reliable Infrastructure

through a seamless digital experience.



Smart Billing Management

Simplify premium collections and payment management with automated billing and invoicing.

- Policy Premium Billing
- Consultation Charges
- Subscription Billing
- Online Payments
- Invoice Generation
- Payment Tracking
- Payment Reminders
- Receipt Generation

Cloud Infrastructure

Insurance Advisory Application already covers all major insurance advisory workflows, helping agencies and advisors manage clients, policies, claims, renewals, communication, and daily operations through one centralized platform.

- AWS
- Microsoft Azure
- Google Cloud

Benefits

- Scalability
- Reliability
- Secure Hosting
- High Availability



- ★ Complete insurance advisory workflows in one secure and scalable platform

Security & Data Protection



Security & Data Protection

Enterprise-Grade Security for Your Insurance Business

- ▶ Dedicated & Secure Cloud Hosting
- ▶ SSL Encryption
- ▶ Separate Database
- ▶ Role-Based Access Control
- ▶ Secure Login Authentication
- ▶ Encrypted Client & Policy Data
- ▶ Daily Automated Backups
- ▶ Firewall Protection
- ▶ Multi-Level User Permissions

This structure matches the professional style of the original presentation while being fully tailored to an Insurance Advisory Application.



Data Privacy & Confidentiality

Your Client Data, Always Protected

- ▶ Dedicated Isolated Hosting
- ▶ No Shared Database Organizations
- ▶ Role-based access control
- ▶ Multi-Level User Permissions
- ▶ Encrypted Client & Policy Data
- ▶ Secure Document Storage
- ▶ Controlled Employee Access
- ▶ NDA Support Available

Your customer and policy data remain secure, private, and fully protected under your control.



Cloud Infrastructure

Secure & Scalable Hosting

Hosted using:

- ▶ AWS
- ▶ Google Cloud Platform
- ▶ Microsoft Azure

Benefits:

- ▶ Better performance
- ▶ Scalability
- ▶ Reliability
- ▶ Data protection
- ▶ Upgrade flexibility

Infrastructure can be scaled anytime based on operational growth.

Implementation Timeline

Quick Deployment Process

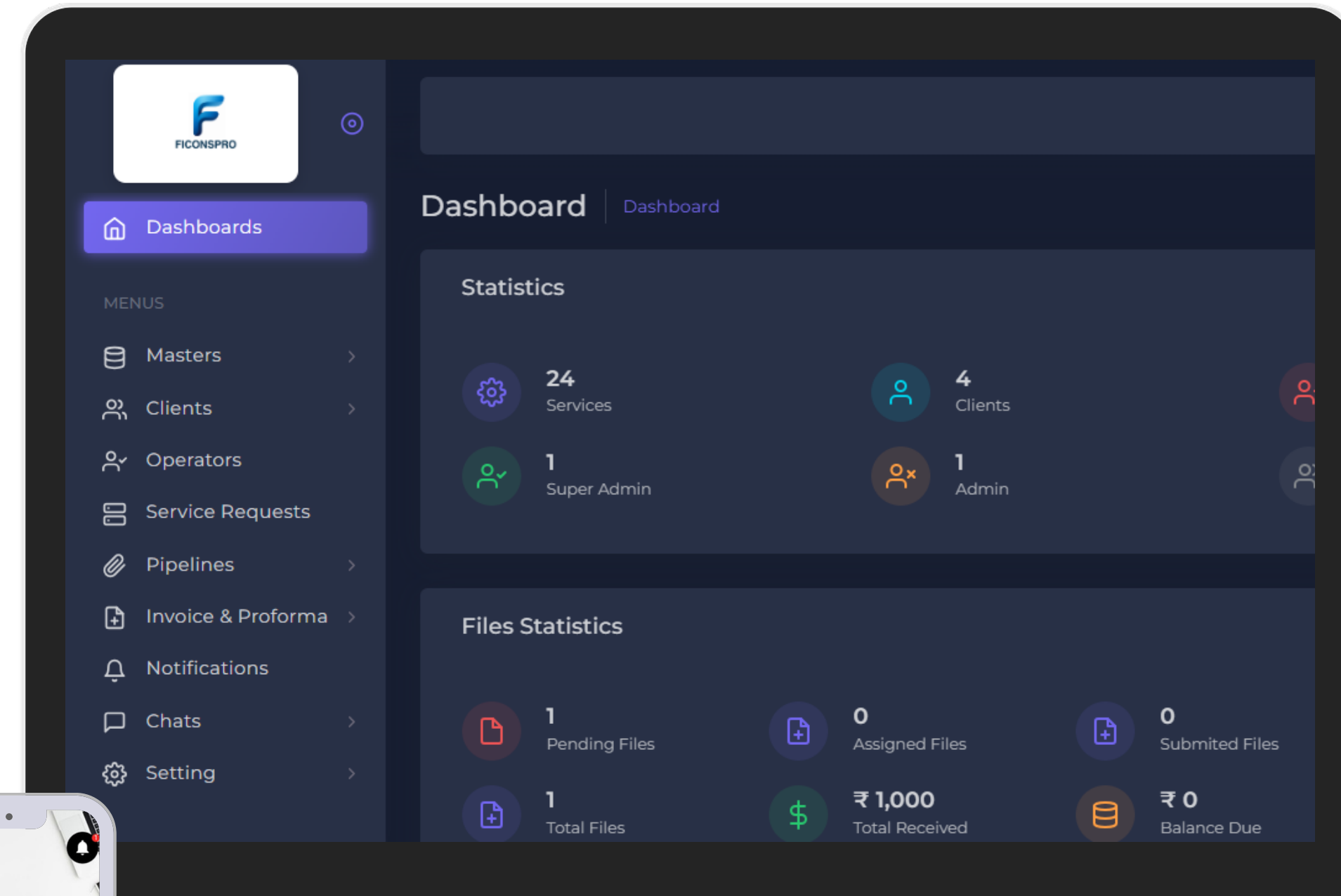
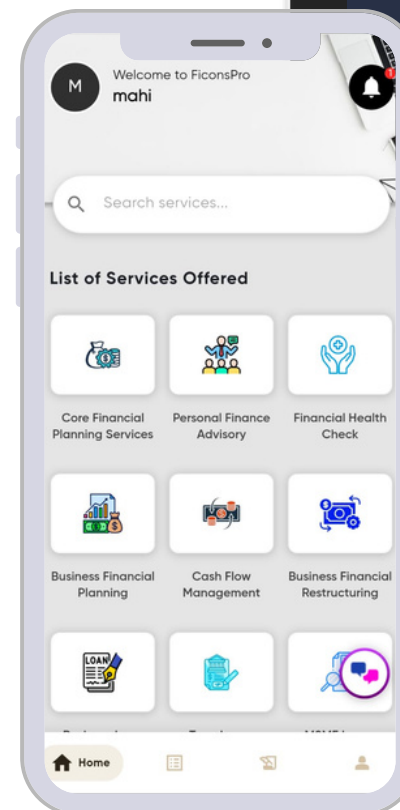
Within 3–5 Working Days

- ▶ Branded Web Application Deployment
- ▶ Admin Panel Configuration
- ▶ Initial Setup & Branding
- ▶ Android APK for Testing
- ▶ iOS TestFlight Access

Mobile App Approval

Typically:

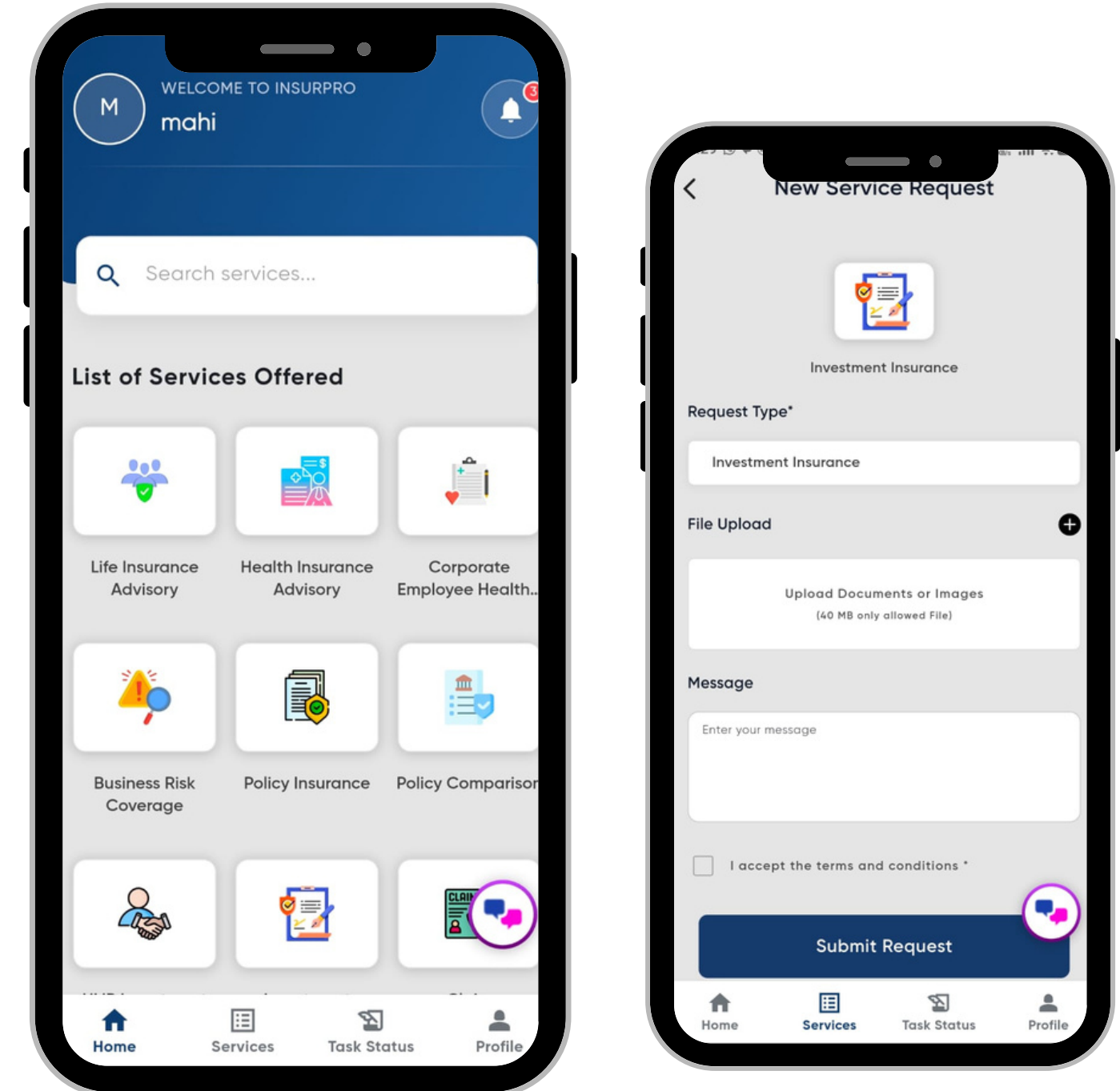
- ▶ **7–15 days**
- ▶ Based on Play Store / App Store review timelines



Communication & Payment Integration

Supports

- 1 Email Notifications
- 2 SMS Alerts
- 3 Push Notifications
- 4 Renewal Reminders
- 5 Online Payments



Support & Scalability

Built for Long-Term Growth

- ▶ Technical Support
- ▶ Server Scaling
- ▶ Server scalability
- ▶ Storage Expansion
- ▶ Feature Enhancements
- ▶ Future Growth Support

Designed to grow along with your firm operations.



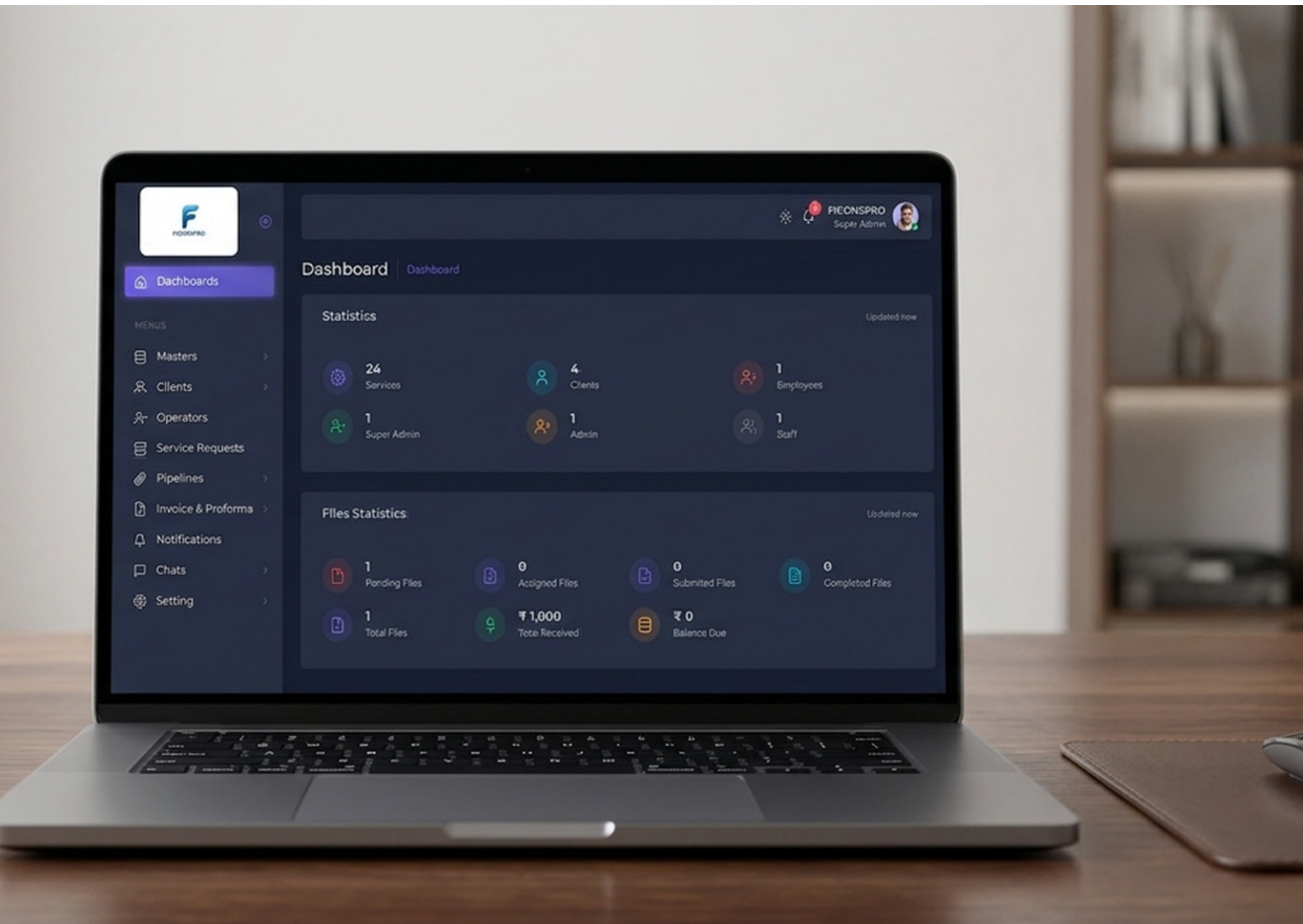
Support & Scalability

- Ongoing technical support
- Priority support options
- Server scalability
- Storage upgrades
- Additional feature development
- Future expansion support

Designed to grow along with your firm operations.



Why Choose Insurance Advisory Application?



Key Benefits

- ▶ Ready-to-use platform
- ▶ White-Label Solution
- ▶ Faster Deployment
- ▶ Web & Mobile Apps
- ▶ Centralized management
- ▶ Complete Policy Management
- ▶ Renewal Automation
- ▶ Claims Tracking
- ▶ Centralized Customer Management

Reach Us

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Live Demo



Pricing Discussion

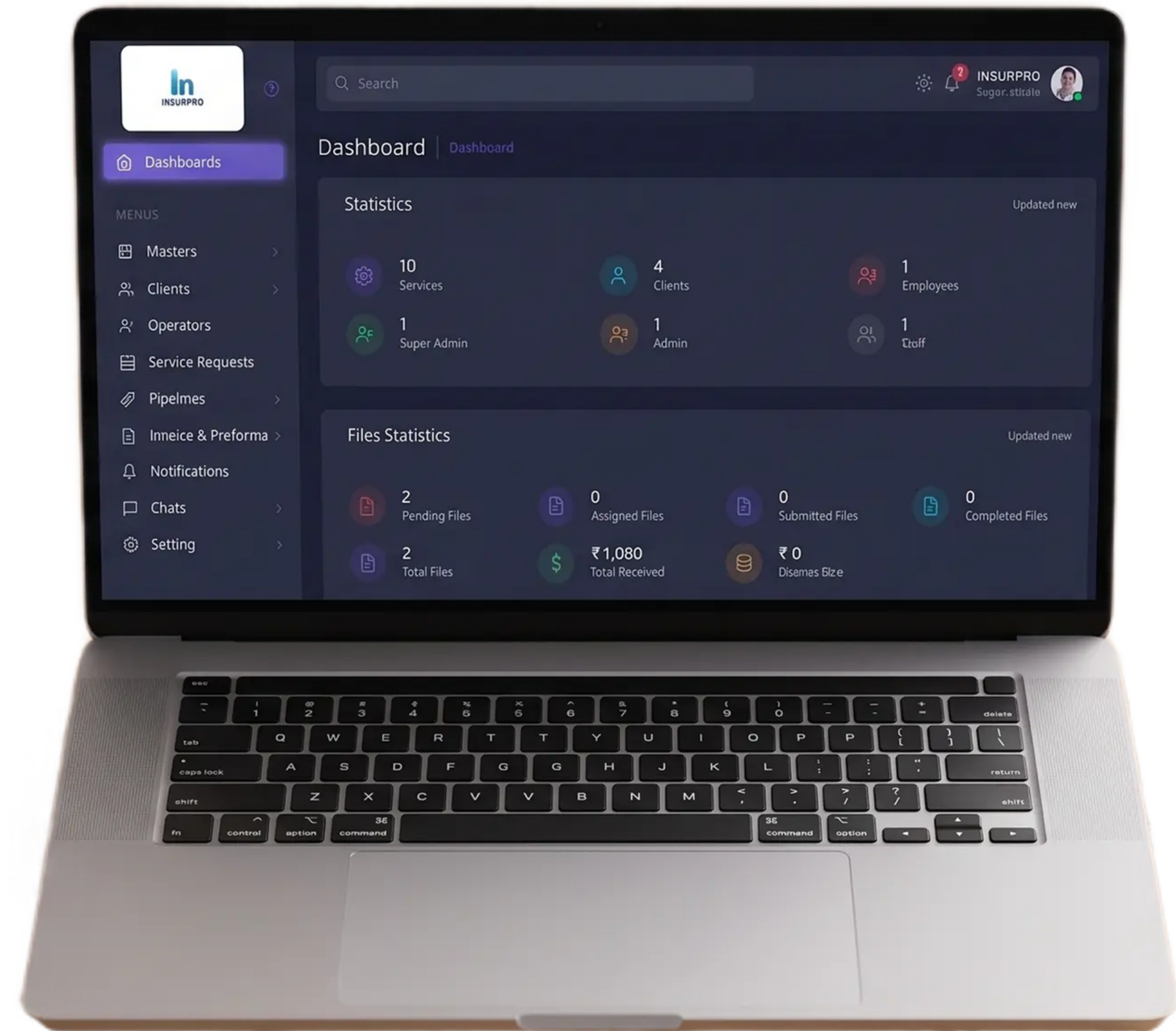


Customization Consultation



Partnership Opportunities

Website



Powered by Amrithaa



Thank you

**Empowering Insurance Advisors Through
Digital Transformation**



Insurance Advisory application