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# Uzio for Brokers

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Uzio partners with preferred local & regional growth-oriented brokers, who are challenged with lost revenue and increasing client expectations. Uzio is an empowering partnership that builds moats around your employers, grows revenue and helps acquire new clients.

[For Brokers](#)

[For Employers](#)

[For Employees](#)

For preferred local & regional growth-oriented brokers who are challenged with lost revenue and increasing client expectations,

**Uzio is an empowering partnership that provides a cost-effective solution that simplifies benefits management for SMBs.**

Unlike other offerings, Uzio improves client retention, grows brokerage revenue and facilitates new client acquisition strategies.

## KEY PERFORMANCE INDICATORS

**Enjoy your broker homepage that highlights your KPIs and stay focused on your core business.**

Uzio brilliantly lays out a high level overview of your critical figures to help you see your strengths and identify growth opportunities within your book of business.



### Tracking Enrollments

From open enrollment status to upcoming renewals, see it all. Keep an accurate account of total lives enrolled by product, as well as dollars sold by products. You will better serve your clients and make new offerings.



### Broker Friendly Tools

Uzio has a built in renewal calendar so you, and more importantly your client, will never miss a deadline again. You will also want to take advantage of the compliance checklist and your commission calculator.

## MASTER YOUR BROKER PORTAL

**Your central control hub with a 360 degree view of your clients.**

Uzio gives you the ability to manage your clients and deploy all functions of your business from one central location.



### Uzio As Your Partner

"Uzio will help you set up and upload your client data. We provide you, your clients, and their employees with 24 hour customer and technical support.



### A True Technology Platform

Manage all account activities within a paperless environment. Create benefits plans, manage employee census, classifications and enrollments. Track real-time data, share links and resources.

## BE READY TO GROW YOUR BUSINESS

### Uzio makes it easy to be prepared for that mid-year takeover.

Uzio has functions built into the platform that help you build proposals, create financial modeling and download standardized templates. When opportunity knocks, be prepared.



### Centralized File Location

Your files, all digitally stored in one place. Use the templates and file center section provided. Never scramble for papers, scanner, fax machines or printers again.



### Built in CRM Qualities

Uzio sets up your client information like a CRM. Enroll, reject, accept and resend benefits proposals with one touch to any client electronically.

## FEATURES FOR BROKERS

Click on feature to see details.



CLIENT PORTAL



UZIO MARKETPLACE



COMMISSION CALCULATOR



COMMISSION ESTIMATOR



AGENCY MANAGEMENT



CONFIGURABLE BRANDING



MANAGE EMPLOYEES



PRODUCTS SUPPORTED



BUSINESS REPORTING



CARRIER ENROLLMENT APPLICATION FORMS

## GET A DEMO



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