

Carrier Transactions by Distributor by Product Name - Insurance Technologies

Report Date: November 19, 2019

Activity Type: All Activities

| Organization Name | Dec | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Total | Avg |
|-----------------------------------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-------|-------|
| Insurance Technologies | 11 | 11 | 7 | 0 | 5 | 5 | 4 | 1 | 6 | 14 | 172 | 112 | 348 | 29.00 |
| Application - Application (103) | | | | | | | | | | | | | | |
| Insurance Technologies | 6 | 9 | 5 | 0 | 4 | 4 | 2 | 1 | 3 | 12 | 65 | 45 | 156 | 13.00 |
| Benefit Solutions | 0 | 0 | 0 | 0 | 1 | 0 | 0 | 0 | 0 | 2 | 0 | 1 | 4 | 0.33 |
| Classic Term (10) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 0 | 1 | 0.08 |
| Classic Term (15) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 6 | 6 | 12 | 1.00 |
| Classic Term (20) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 1 | 0.08 |
| Classic Term (30) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 1 | 0.08 |
| EDGE 7 General | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 2 | 3 | 6 | 0.50 |
| Elite Term (10) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 4 | 5 | 0.42 |
| Elite Term (20) | 0 | 2 | 0 | 0 | 0 | 1 | 1 | 0 | 0 | 0 | 0 | 0 | 4 | 0.33 |
| Elite Term (30) | 0 | 0 | 5 | 0 | 0 | 0 | 0 | 1 | 0 | 0 | 0 | 2 | 8 | 0.67 |
| Financial Protection | 0 | 2 | 0 | 0 | 2 | 3 | 1 | 0 | 1 | 0 | 2 | 0 | 11 | 0.92 |
| Impact Advantage | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 1 | 0.08 |
| Income Choice | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 1 | 0.08 |
| JET Term 5 (10) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 2 | 0 | 3 | 0.25 |
| JET Term 5 (15) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 2 | 0 | 3 | 0.25 |
| JET Term 5 (20) | 0 | 3 | 0 | 0 | 0 | 0 | 0 | 0 | 2 | 0 | 0 | 1 | 6 | 0.50 |
| JET Term 5 (30) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 12 | 0 | 12 | 1.00 |
| Promise Term (10) | 6 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 27 | 11 | 44 | 3.67 |
| Promise Term (15) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 5 | 0 | 5 | 0.42 |
| Promise Term (20) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 1 | 0.08 |
| Promise Term (30) | 0 | 2 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 2 | 0.17 |
| Term Accel (10) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 0 | 0 | 1 | 0.08 |
| Term Accel (15) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 3 | 1 | 7 | 11 | 0.92 |
| Term Accel (20) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 2 | 0 | 0 | 2 | 0.17 |
| Term Accel (30) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 1 | 0 | 2 | 0.17 |
| Term Protect (10) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 0 | 1 | 0.08 |
| Term Protect (15) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 2 | 0 | 2 | 0.17 |
| Term Protect (20) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 1 | 0.08 |
| Term Protect (30) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 2 | 2 | 0.17 |
| Ultimate Guarantee | 0 | 0 | 0 | 0 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 2 | 3 | 0.25 |
| Peak Financial Services | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 32 | 0 | 32 | 2.67 |
| Essential Term (30) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 32 | 0 | 32 | 2.67 |
| Application - Application (103) - | | | | | | | | | | | | | | |

ABC123DEF456

| | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|----|----|-----|------|
| IT Brokers | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 56 | 45 | 101 | 8.42 |
| Benefit Solutions | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 1 | 0.08 |
| Classic Term (10) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 0 | 1 | 0.08 |
| Classic Term (20) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 5 | 6 | 11 | 0.92 |
| Classic Term (30) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 1 | 0.08 |
| EDGE 7 General | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 1 | 0.08 |
| Elite Term (10) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 2 | 3 | 5 | 0.42 |
| Elite Term (20) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 4 | 5 | 0.42 |
| Elite Term (30) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 2 | 2 | 0.17 |
| Endeavor Plus | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 2 | 0 | 2 | 0.17 |
| Financial Protection | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 1 | 0.08 |
| Impact Advantage | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 1 | 0.08 |
| Impact Advantage | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 2 | 0 | 2 | 0.17 |
| Income Choice | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 0 | 1 | 0.08 |
| iSured FA | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 1 | 0.08 |
| Promise Term (10) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 12 | 0 | 12 | 1.00 |
| Promise Term (20) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 20 | 11 | 31 | 2.58 |
| Promise Term (30) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 5 | 0 | 5 | 0.42 |
| Term Accel (10) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 1 | 0.08 |
| Term Accel (20) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 7 | 8 | 0.67 |
| Term Accel (30) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 0 | 1 | 0.08 |
| Term Protect (10) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 0 | 1 | 0.08 |
| Term Protect (20) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 2 | 0 | 2 | 0.17 |
| Term Protect (30) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 1 | 0.08 |
| Ultimate Guarantee | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 2 | 2 | 0.17 |
| Ultimate Guarantee Plus | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 2 | 2 | 0.17 |
| SubPay - Sub Pay (508) | | | | | | | | | | | | | | |
| Insurance Technologies | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 1 | 0.08 |
| SubPay Ultimate VA | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 1 | 0.08 |
| PreSale - Account Opening (106) | | | | | | | | | | | | | | |
| Insurance Technologies | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 3 | 3 | 6 | 0.50 |
| Account Opening | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 0 | 1 | 0.08 |
| ASD Account Opening | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 2 | 3 | 5 | 0.42 |
| PreSale - Needs Determination (116-11600) | | | | | | | | | | | | | | |
| Insurance Technologies | 0 | 1 | 0 | 0 | 0 | 0 | 2 | 0 | 2 | 0 | 12 | 9 | 26 | 2.17 |
| AJL Needs Determination | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 8 | 0 | 8 | 0.67 |
| GH Needs Determination | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 1 | 0.08 |
| JB Needs Determination | 0 | 0 | 0 | 0 | 0 | 0 | 2 | 0 | 2 | 0 | 2 | 6 | 12 | 1.00 |
| JK Pre-Sale | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 2 | 2 | 0.17 |
| Needs Determination Qualified | 0 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 2 | 0 | 3 | 0.25 |
| PostIssue - Generic Post Issue (113) | | | | | | | | | | | | | | |
| Insurance Technologies | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 2 | 2 | 0.17 |
| Ultimate WL | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 2 | 2 | 0.17 |
| eDelivery - E-Delivery (121-12100) | | | | | | | | | | | | | | |

| | | | | | | | | | | | | | | |
|--------------------------------|---|---|---|---|---|---|---|---|---|---|---|---|----|------|
| Insurance Technologies | 4 | 1 | 2 | 0 | 1 | 1 | 0 | 0 | 1 | 2 | 0 | 3 | 15 | 1.25 |
| eDelivery | 4 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 2 | 0 | 3 | 11 | 0.92 |
| eDelivery RM | 0 | 0 | 2 | 0 | 1 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 4 | 0.33 |
| Printforms - Print Forms (310) | | | | | | | | | | | | | | |
| Insurance Technologies | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 4 | 4 | 9 | 0.75 |
| Print Forms | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 4 | 4 | 9 | 0.75 |