I like the ability to give an A/B to a quote option without creating a full new option (term is the only difference here). These cards are featured too prominently though with too much empty space considering this is edge case.

Pricing & Terms
Configure financial terms for this structure.

Remove Variations

OPTION A (STANDARD)

PREMIUM	COMM %
$ 50,000	15.0 %

📅 12 Months

OPTION B (LONG TERM)

PREMIUM	COMM %
$ 75,000	20.0 %

📅 18 Months (Edit)

Header to this is clean. Actual table has potential (would want to avoid multiline and extra colors like in this)

| Endorsements | Subjectivities | Coverages | Add endorsements... |

ITEM NAME	OPTION A STANDARD	OPTION B LONG TERM	
🔒 War & Terrorism Exclusion	✓	✓	
📄 Excess Follow Form	☑	☑	🗑
🛡 Biometric Exclusion **Recommended for Long Term**	☐	☑	🗑

Graphic is cool, but we don't ever get info above us, and unless we can make that graphic actually do something or have wasted space we should repurpose it. The tower is super clear and I really like it. I don't know what adding/building it looks like, but the presentation here is very nice

Tower Structure

Hide Advanced Metrics

	CARRIER	LIMIT	ATTACH	PREMIUM	RPM	ILF
$20M — $10,000,000	TBD	$10,000,00	$10,000,00	—	—	—
$10M — OUR LAYER $5,000,000 xs $5,000,000	● CMAI (Ours)	$5,000,000	$5,000,000	$50,000	$10K	1.00
$5M — $5,000,000 xs $0	Beazley	$5,000,000	$0	—	—	—
$0 —						

Very Ugly to me and lacking flow and isn't intuintive

Policy Dates

Effective Date

```
12/30/2026
```

Expiration Date

```
12/30/2027
```

Policy Period: 12 month policy period (dates to be determined)   Set specific dates

Retroactive Dates   Apply to All   Edit

Per-coverage retro schedule

Cyber Liability   Full Prior Acts

Privacy Liability   Inception

Network Security   Date (01/01/2020)

Retro Notes

```
Additional notes about retroactive coverage...
```

Could be nice

ITEM NAME		$5M XS $5M STANDARD ANNUAL	$5M XS $5M 18 MONTH (ODDL)	$2M X $25K PRIMARY OPTION	
🔒 War & Terrorism Exclusion Mandatory		✓	✓	✓	
📄 Biometric Exclusion		☐	☑	☐	🗑
📄 Excess Follow Form		☑	☑	☐	🗑

Endorsements   Subjectivities   Coverages

🔍 Add endorsements...

Side card is nice, but need to refine content. We don't need to repeat ourselves (applicant/rev)

View All Documents

$25K   DRAFT
Option

Limit   Tower
$2M $2M x $25K

bjectivities   Documents

Quick Reference   ✕

SUBMISSION

Applicant
Karbon Steel

Revenue
$5.0B

LATEST DOCUMENT

Quote Document
Dec 30, 2026
👁 View PDF

PENDING ACTIONS

🔔 2 pending subjectivities

🕐 Review quote Option 2

RECENT CHANGES

● Updated tower structure
● Added enhancement

Maybe useful, but bad options labeling in this format. Button way to far away from lowest content. Text too busy with some of the additional content

CROSS-OPTION MATRIX ✕

	Endorsements		Subjectivities

Item	$5M	$5M	$2M
🔒 War & Terrorism Exclusion	✓	✓	✓
🔒 OFAC Sanctions Compliance	✓	✓	✓
Biometric Exclusion	☐	☑	☐
⚡ Additional Insured Schedule Enhancement: Additional Insureds	☑	☐	☐
⚡ Extended Reporting Period Enhancement: Modified ERP	☐	☑	☐

🔍 Add endorsement...

Apply to All Options

Copy from Another Option

Visually very interesting, but overwhelming. The cards feel right. But we need to figure out how to not be overpowered by random content. Bind readiness on this one is cool

Quote v7 - Workflow Ledger

Karbon Steel Industries
$5.0B Revenue - Tech Manufacturing - New Business

⊘ Quote in progress   ∿ Latest doc: Mar 12   ⬇ Generate   ⊘ Bind Option

EXCESS OPTION	QUOTED	EXCESS OPTION	DRAFT	PRIMARY OPTION	DRAFT	+ New option
$5M xs $5M		**$5M xs $5M**		**$2M x $25K**		
Standard Annual	$52,500	18 Month ODDL	$78,750	Primary Option	$38,500	

OPTION TOOLS

☐ Clone selected

⊘ Delete option

APPLY TO ALL
Retro schedule   ⬤
Coverage flags   ○

DOCUMENT PULSE

Quote   SENT
Quote - $5M xs $5M
Mar 12

Package   READY
Package - Quote + Endorsements
Mar 12

SELECTED OPTION
$5M xs $5M
Standard Annual - FF-CYBER-2024

⬇ Generate quote   ⊘ Bind

TECHNICAL	RISK ADJUSTED	SOLD PREMIUM
$58,000	**$55,000**	**$52,500**

POLICY LIMIT	RETENTION / ATTACH
5,000,000	**5,000,000**

Tower structure   Edit tower

CARRIER	LIMIT	ATTACH	QS	RPM / ILF
TBD	$10M	$10M	--	-- - --
CMAI	$2.5M	$5M	$5M	$10.5K - 1.00
Partner Re	$2.5M	$5M	$5M	$10.5K - 1.00
Beazley	$5M	$0	--	-- - --

⊗ Add underlying layer

Dates + Retro schedule
Global policy dates with per-coverage retro schedule.

🗓 Apply to all

POLICY PERIOD	RETRO SCHEDULE	
12 month policy period	Cyber liability	Full prior acts
Set specific dates	Privacy liability	Inception

BIND READINESS   ⚠

- Policy effective date not set

- 1 subjectivity still pending

- Tower quota share is 50% filled

- Retro schedule not applied to all options

Review blockers

CROSS-OPTION MATRIX   Hide

⚶ Subjectivities   6 items

⊘ Endorsements   8 items

⊟ Coverages   12 items

⊞ Open full matrix

WORKFLOW STATUS

Pricing locked   ⊘

Tower validated   ↻

Subjectivities sent   △

Send quote package →

Interesting but the long on buttons don't look good

Quote Option Assignments

3 options | 6 items | Export matrix

Mid density grid with quick filters and diff focus.

| Endorsements | Subjectivities | Coverages |

🔍 Search items | ⏚ Filters

◉ Required only | ◉ Auto only | ◉ Only differences

⚏ Batch edit

ENDORSEMENTS	$5M xs $5M Standard Annual quoted	$5M xs $5M 18 Month ODDL draft	$2M x $25K Primary Option draft
ENDORSEMENTS (6)			
🔒 END-WAR-001 **War and Terrorism Exclusion** Required	ON	ON	ON
🔒 END-OFAC-001 **OFAC Sanctions Compliance** Required	ON	ON	ON
⚒ END-AI-001 **Additional Insured Schedule** Auto	ON	OFF	OFF
⚒ END-ERP-001 **Modified ERP Terms** Auto	OFF	ON	OFF
⚏ END-BIO-001 **Biometric Exclusion** Optional	OFF	ON	OFF
⚏ END-TEO-001 **Tech E and O Extension** Optional	ON	ON	OFF

Required items are locked. | Auto items follow enhancements. | Use batch edit to sync changes.