

OPERATIONS · SYSTEM OF RECORD



Getting sales back to sales.

PulseConnect is the operational system of record for IMOs and BGAs — case management, contracting, recruiting, accounting, and communications on one connected data model, so your team sells instead of babysitting spreadsheets.

WHAT YOU GET

- ✓ **Case & application management**
Across life, annuity, LTC, ABLTC, and Medicare.
- ✓ **Contracting & recruiting**
Pipeline, hierarchy, and SureLC licensing in one place.
- ✓ **Communications hub**
Email, text, and calls on a single system of record.
- ✓ **Auto case creation**
Completed e-apps from FireLight, iGO, and AnnuityNet flow straight into your pipeline.
- ✓ **Commission processing**
Override waterfalls and rolling-target logic, reconciled per payee.
- ✓ **Concierge data migration**
Our team maps and cleanly migrates decades of data from multiple platforms.

Built for IMOs and BGAs running life & annuity distribution.

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Connected data model

3

E-app sources auto-created

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Bolt-ons required