

OPPORTUNITY AUDITING · INFORCE



The business hiding in your book.

PulseDrive continuously audits your inforce book and pipeline — inforce annuity audit, illustration intake, and repositioning strategy — flagging placement risk, persistency leaks, and unworked opportunities, ranked by the income lift and commission at stake.

WHAT YOU GET

- ✓ **Inforce audit**
Surrender value, rider fees, income timing, and lift across the book.
- ✓ **Illustration intake**
Upload the latest carrier illustration to unlock modeling.
- ✓ **Placement & persistency**
See what is at risk and where to act.
- ✓ **Replacement modeling**
Rank carrier options by day-1 income, 5-year income, and surrender loss.
- ✓ **Strategy comparison**
Roth, annuity + income rider, and asset-based LTC, side by side.
- ✓ **Ranked by dollars**
Every opportunity sorted by the profit at stake.

Built for advisors growing their annuity book while supporting best-interest outcomes.

\$64K

5-yr income lift modeled

Ranked

By dollars at stake

**Best-
interest**

By design