

Stuart

Your Digital Underwriting Assistant

Reimagine your underwriting operation

Key Underwriting Processes:

- ▶ Setup & Clearance
- ▶ Triage
- ▶ Underwrite & Rate
- ▶ Quote
- ▶ Bind & Policy Issuance
- ▶ Policy Servicing



System Knowledge

Duck Creek Rating
Majesco
Insurity
Guidewire Policy Center
Oracle
PL Rating
Sapiens
OneShield
Insuresoft
Socotra
Carrier/MGA bespoke systems



Document Knowledge

Premiums
Policies
Endorsements
Renewals
ACORD applications
SOVs
Loss runs
Carrier specific applications/questionnaires

Key Skills

- ▶ Collect and analyze insurance information that facilitates the risk assessment process and provides underwriting support
- ▶ Read and understand data held within documents, emails and forms
- ▶ Collect and analyze insurance information that facilitates the risk assessment process and provides underwriting support
- ▶ Execute set up and clearance within your current systems
- ▶ Update systems and transact data to support the underwriting process
- ▶ Perform initial underwriting triage - assign risks to relevant underwriters and auto decline undesirable risks to your underwriting rules
- ▶ Issue quotes and binders
- ▶ Perform policy change requests and/or endorsements
- ▶ Integrate with accounting and billing systems
- ▶ Work with colleagues to troubleshoot anomalies and exceptions

Fully-Loaded

- ▶ 100% SaaS
- ▶ Training & Improvement
- ▶ Management & Reporting Suite
- ▶ Communication & Collaboration Tools
- ▶ 24/7 Availability
- ▶ 100% Utilization

Increase your quote-to-bind ratio by supercharging your Underwriting team with AI and Automation (Revenue / Capacity / Accuracy)



3 - 4 Intermediate
Underwriting Assistants



\$70,000 - \$98,000
per person
(fully loaded)



\$392,000 p.a.
Total estimated fully-loaded
Human Equivalent cost