



# Underwriting Services Overview

Empowering Advisors with Expertise, Resources, and Concierge-Level Support

**Partner with Simplicity to deliver smarter, faster, and stronger underwriting outcomes.**

Simplicity's underwriting services are designed to elevate the advisor experience, enhance case outcomes, and streamline the path from submission to approval. We offer a comprehensive, tiered approach to underwriting support that integrates deep expertise, tailored tools, and personalized guidance.

## Strategic Expertise

Simplicity's foundation is built on in-house underwriting subject matter experts who provide strategic insight across every facet of the organization. This internal expertise informs:

- Operational decision-making
- Sales enablement strategies
- Service process design
- Technology development

By embedding underwriting knowledge into business functions, Simplicity ensures alignment with carrier expectations, faster issue resolution, and smarter resource allocation.

## Advisor-Centric Tools & Resources

To empower agents, Simplicity has developed a suite of field underwriting tools and resources that simplify case prep and strengthen submissions. These include:

- Carrier underwriting guides & risk class summaries
- Pre-screening questionnaires, Quick Quotes and impairment checklists
- Interactive digital tools for quoting and risk assessment

This level of support gives advisors confidence in their recommendations and improves placement ratios through better-informed submissions.

## Concierge-Level Case Consultation

For high-opportunity or complex cases, qualified advisors gain access to personalized, concierge-style underwriting support. This includes:

- Pre-application consultation and discussion
- Direct engagement with senior underwriters
- Customized carrier negotiation strategies
- Impairment-specific case design support

Simplicity advocates alongside advisors to ensure every case is positioned optimally—turning challenges into approvals and opportunities into placements.

**Contact your Simplicity representative for more information  
or visit [SimplicityAgentCenter.com](https://SimplicityAgentCenter.com)**