

# Carrier Tasks

Totally and exclusively dedicated to the insurance industry, ReSource Pro fully understands all facets of processing and operations. Expertise in over 1,000 client-driven tasks enables the ReSource Pro team to develop custom solutions for each client, thereby providing higher success rates, lowered risk, and easier adaption. Continual open communication between our workers and our clients, along with our stateside support team, creates a highly efficient level of seamless productivity.

Here is a sampling of tasks we perform for carrier clients:

## Policy Handling Support

- Prepare issuance instructions
- Policy issuance/typing
- Policy accuracy/checking
- Policy delivery
- Process endorsements
- Handle invoicing
- Send notices
- Follow-up for information

## Underwriting Support

- Submission entry
- Renewal solicitation
- Enter data for predictive modeling analysis
- Rating
- Internet searches for support data
- Prepare loss summaries
- Develop proposals
- Follow-up with agent for information

## Administrative/Accounting

- Conversion support
- Running reports/spreadsheets
- Reconciliation (Direct or Agency Bill)
- Premium finance
- Policy delivery
- Policy coding
- Run MVRs
- Schedule agency review meetings
- Attach emails to policy or agency files

## Reporting & Special Projects

- Handle Surplus Lines Filings
- Systems integration/migration
- Assist with book rolls
- Provide seasonal capacity
- Large schedule conversions
- Assist with marketing campaigns

*If you can define it....we can do it!*

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