



IMS SETTLEMENTS, LLC

Maximizing Policy Value

Technology & Service

As the Life Settlement industry has grown there have been numerous advancements in regulation and self compliance as well as the emergence of more flexible and competitive pricing models. All of these things have greatly contributed to the continued growth of the life settlement industry. However, the industry has been faced with some significant growing pains which have made it difficult for Providers and Life Settlement Brokers to provide the necessary service and support to their Producers and Financial Advisors.

As the industry begins to mature it will become increasingly important for Providers and Life Settlement Brokers to pay more attention to their value add propositions. Life Settlement Brokers in particular will need to start seeing themselves more as IMOs/BGAs and not just as capital sourcing experts. Implementation of case management systems, offering periodic or online case status reports, providing advanced sales support and co-op marketing are just a few of the things that will become standard offerings from Life Settlement Brokers. The independent financial planner is used to receiving these types of services from his/her life & annuity wholesalers and they are beginning to demand more from their Life Settlement Brokers.

The Life Settlement market will continue to mature and evolve. This is an exciting prospect as systems and technology will be more effectively deployed across the Provider, Broker and Underwriting levels which will lead to a reduction in the transaction processing times and a better flow of information. This will result in a general improvement in the quality of service through out the industry. Faster execution of deals will inevitably lead to the increased attractiveness of the Life Settlement market to both Producers/Financial Advisors, as well policy owners.

The next wave of growth in the life settlement market will be fueled by better technology, streamlined processes, as well as advanced marketing and sales support. Service and support at all levels will be imperative.

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