

Insurance Processing for Property & Casualty

Increasing operational efficiencies.

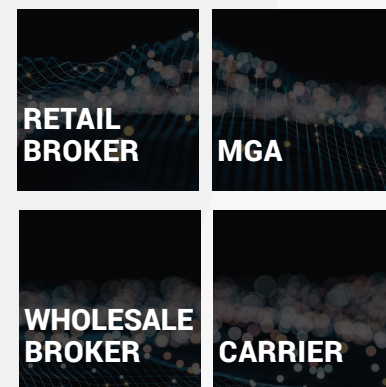
Whether you're a retail broker, MGA, wholesaler or carrier, finding opportunities to maximize organizational value is vital. Our experienced insurance professionals address your staff's workload to improve efficiency, increase internal productivity and grow top-line revenue. Free your account management staff to spend more time growing the business and building customer relationships and less time on administrative tasks.

Patra designed a workflow specific to our needs. Our average task processing time has decreased by 33%, our annual expenses related to outsourced activities have decreased roughly by 55%, and Patra has helped us realize over \$2.2M in aggregate expense savings to date. Our enhanced profitability has subsequently allowed us to accelerate reinvestment capital back into our aggressive growth initiatives.

Ryan Clarkson
COO – Atlas General Insurance Services

- ✓ Dedicated team to your agency
- ✓ Increase top-line revenue
- ✓ Standardize workflows
- ✓ Reduce agency staff workload
- ✓ Improve process efficiency and consistency
- ✓ Improve customer service
- ✓ 24-hour coverage
- ✓ Reduce risk

Markets Served



Around the clock services to meet your processing needs.

Need more support when your staff takes leave? Heavy renewal period? Need a rush certificate completed the same day? Your dedicated team of Process Executives will work around the clock to ensure your deadlines are met. Below are a few of the services that Patra offers to insurance companies.

Policy Services

- › Policy checking and delivery
- › Summaries and letters
- › Endorsement processing
- › Renewal processing
- › Cancellation warning notices
- › Document retrieval

Certificate Services

- › Certificates and evidences
- › Endorsements and waivers
- › Blockchain-protected certificate delivery and storage
- › Printing and mailing

Accounting & Billing

- › Direct bill invoicing
- › Cash application
- › Expense report tracking
- › Agency bill invoicing

Data Entry

- › AMS updates
- › New business
- › Quoting and proposals
- › Prospect and market research
- › New producer books
- › Acquisition integration

MGA & Wholesale Services

- › Submission data entry & clearance
- › Policy issuance
- › Endorsement issuance
- › Quote & summary preparation
- › Broker invoicing
- › Renewal Preparation

Claims Services

- › Loss run ordering
- › Premium loss summaries
- › Claim inputting
- › Claim acknowledgment letters
- › Claim tracking
- › Unit stat

Patra OnDemand at a Glance

4M⁺

Certificates
Issued Annually

30%

of Top 100 Agencies
are Customers

2.2M

Hours of
Agency Time Saved

280+

Partner
Relationships

200+

Licensed
Agents

2,605

INC 5000
Ranking

PATRA[™]

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It's that simple. Get the ball rolling by reaching out to Patra
business development team at sales@patracorp.com