



**SE2**

PurposeBuilt to FutureProof

An Overview



## SE2 supports your most critical business objectives

SE2 administers life insurance products including term, whole life, interest sensitive whole life, universal and variable universal life. We also administer fixed, variable and index annuities.

### ☑ Rapid launch of new products.

SE2 helps you get new products to market quickly and efficiently, in a third less time and at up to a third less cost than when compared to in-house teams.

### ☑ Conversion of in-force and close blocks.

With SE2, you can convert from high fixed costs to variable costs while reducing your reliance on aging technologies and redundant platforms.

### ☑ Streamlined business transitions.

SE2 has a 100 percent success rate for data conversion and business transition projects, reducing your risk for large-scale data conversion and migration initiatives. Converting to SE2 provides real time access to your data as well.

### ☑ Support across every distribution channel.

SE2 supports channels including Wirehouse, Broker Dealer, IMO, BGA, PPGA, Bank and Career Agency.



# Variabilize costs, fuel growth and reduce risk

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Growth happens when you can innovate new products and create great customer experiences. It's much more difficult if scarce resources need to be allocated to maintaining old products and the legacy systems required to support them.

SE2 helps you focus on growth. We simplify your operations, variablize your costs and help you bring new products to market fast. You get the complete, end-to-end services and technology you need, mirroring your operations at a fraction of the cost.

## Life and annuity insurance is our DNA

SE2 has long experience and deep expertise in life and annuity insurance. We understand the daily regulatory, cost and competitive pressures you face. It's why some of the top insurance brands in the world have entrusted operations and administration to SE2.

The results speak for themselves: an unmatched record of success, with more than 2.5+ million policies, \$100 billion plus of assets under administration, more than 25 conversions and 1.5 million distribution entities.

2.5M+

Policies Covered

\$100B

Assets Under Administration

30

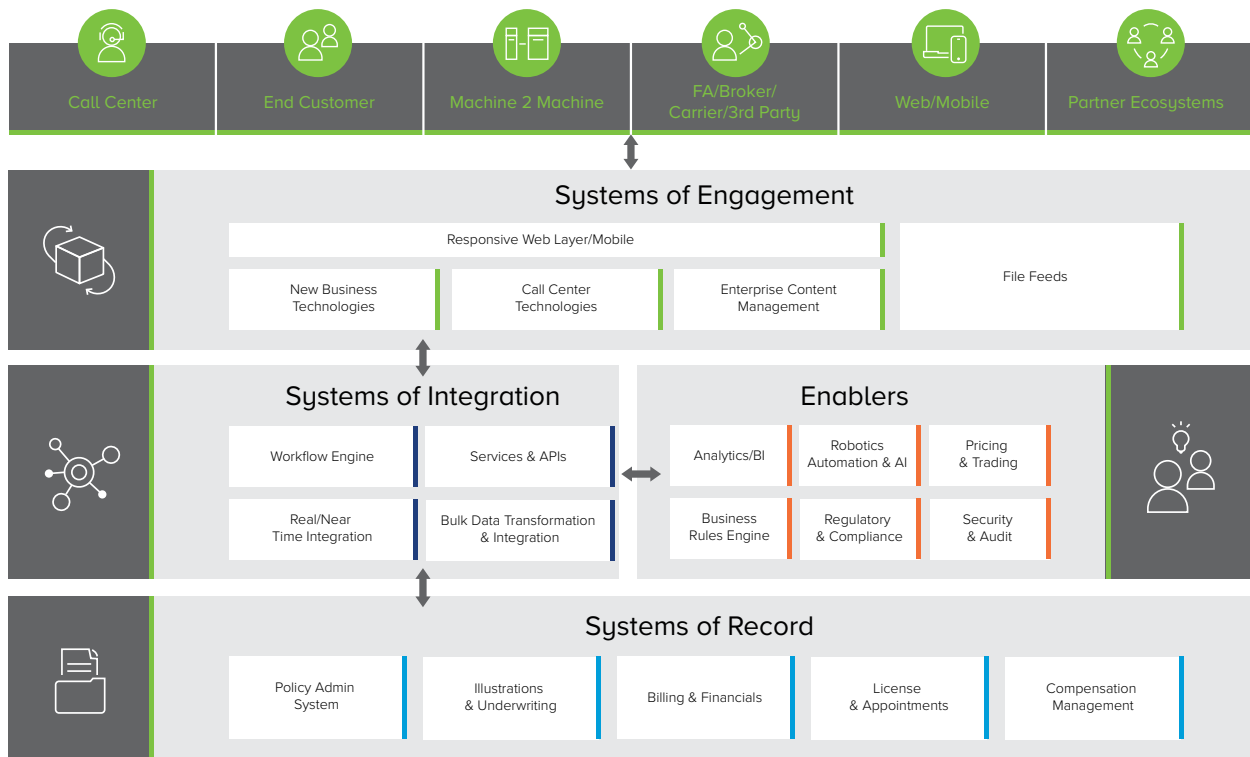
Conversion Projects

1.5M

Distribution Entities

# The most advanced and complete operations platform for life and annuity

The SE2 Aurum Platform is the future-proof technology built from the ground up for life and annuity insurance. Its continuously improved, highly scalable, multi-tenant architecture supports end-to-end services, helps streamline administration and speeds your time to market.



Ranked a leader in Life and Annuity BPO by Everest Group and NelsonHall.



## Committed to your success

We're not satisfied until you, and your customer, are satisfied. The SE2 team is more than 1000 life and annuity experts committed to your satisfaction and the success of your initiatives. You get technologies and processes perfected in concert with some of the top brands in our industry, and support that is around the clock and whenever you need it.



## Data security is Job One

SE2 has rigorous physical, logical and transmission protocols to ensure the safety and security of your data. Customer data is encrypted and is stored and processed in the United States.

## A record unrivaled in life and annuity insurance

- More than 10 years of service to 20+ clients
- Deep focus and experience, born of a life and annuity insurance carrier with 110 years in the business
- Expertise you can count on, perfected with more than 2.5+ million policies under administration, \$100 billion + in assets, and ~200,000 new business applications in 2017 alone
- We're the conversion experts, with more than 25 successes, 2 million plus policies, 1.5 million plus distribution entities and 1500 mutual funds across 113 fund companies
- Technology you can rely on, and that is simply unavailable from anyone else, anywhere



## Why SE2

SE2 is the leading third party administrator for the US life and annuity insurance industry, with an unmatched track record of optimizing and future-proofing insurance back office operations. Peerless industry domain knowledge combined with a leading edge administration platform ensures that SE2 supports its clients with rapid launching of new products, moving insurance carriers to a variable cost model for in-force book operations and dramatically improving the customer digital experience. SE2 supports 25 direct clients, represents more than 35 carriers in North America, and services more than 1000 life and annuity products.





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[SE2.COM](https://SE2.COM)