Trust Protector

A Master Trust Insurance Policy Management System

TAKING MASTER TRUST INSURANCE ADMINISTRATION TO A WHOLE NEW LEVEL

Trust Protector is a secure, state-of-the-art, web-based application designed to assist Trustees and Trust Administrators with the management and tracking of insurance coverage on real and personal property held in trust. This robust system is built around flexible underwriting logic. Comprehensive underwriting data is captured by the system and provides accurate coverage placement and premium billing on an account-by-account basis. Optional binding approval routing is built in for Trustees or Administrators who wish to maintain tighter controls over the coverage placement process. This real time system provides streamlined data entry based upon customizable underwriting rules, instant premium calculations on the placement and cancellation of coverage, online document management and routing, claim management and many other features. Renewal of your master trust insurance program can be performed quickly and efficiently.

- **TRACKING INTERNAL AND EXTERNAL INSURANCE POLICIES** Trust Protector automatically tracks insurance coverage on all active assets in the system.

- **INSURANCE QUOTES PRIOR TO PLACING COVERAGE** Trust Protector's flexible coverage ordering system provides detailed coverage quotes prior to the placement of coverage. Quotes can then be converted into orders with a click of a button. Also, with its built-in coverage wizard, determining the types and amounts of coverage to order based on account assets has never been easier.

- **BUILT-IN OPTIONAL WORKFLOW MANAGEMENT** Based on your management philosophy, orders can be routed through the system's built-in workflow logic to designated departments or personnel who are responsible for reviewing orders and supporting documentation prior to order approval. In addition, certain coverage placements, such as earthquake, can also trigger an automatic risk management review where approval prior to binding coverage is needed. Workflow rules are table-driven, easily modified and can be turned on or off for all or individual coverage types.

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LOAN PROTECTOR INSURANCE SERVICES

A Willis Company®

- **THIRD-PARTY BILLING AND NOTIFICATIONS** This system streamlines accounting and billing by providing automatic generation of third-party invoices (including trusts with multiple beneficiaries). Insurance-related notifications are created in PDF format and can be printed and mailed from your desktop. Images can also be seamlessly imported into your document management system.

- **FILE INTERFACE WITH TRUST MANAGEMENT SYSTEMS** Nightly or weekly asset, billing and insurance data synchronization keeps your trust management system updated with the latest insurance and premium billing information on trust assets.

- **REAL TIME REPORTING** Trust Protector's robust reporting engine provides real time reports to be run from your desktop on everything from current insurance status reports to renewal rating reports. With instant data at your fingertips, managing your program has never been easier.

- **INSTANT EVIDENCE OF INSURANCE DOCUMENTS** Once your order, endorsement or cancellation has been processed, you have immediate access to view or print an Evidence of Insurance Certificate displaying all coverage and premium information.

CONTACT

To learn more about how Trust Protector can benefit your organization, please contact Loan Protector at:

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