



Advanced Professionals Managed Services

Say hello to your secret small account weapon.

Advanced Professionals Managed Services solves the industry dilemma of making small account management efficient and profitable while supporting opportunities to grow your books. **Imagine no more worrying over staffing issues, reinventing workflows or accommodating more volume.**

Key Services

- Proposal development
- New business submissions
- Customer onboarding
- Renewal cycle management
- Incoming client calls
- Benefit collateral
- Creation and maintenance of forms, docs, and contracts
- Compliance and regulatory management and expertise
- Additional services as needed

Our Team



The Advanced Professional Managed Services team offers an unprecedented level of customer service. In addition to more than 25 years' experience, our account managers are completely focused on client support and are reinforced not only by an internal team, but also some of the best insurtech available in the market today. Advanced Professional Managed Services exceeds customer expectations.

Who is Eligible?



As the insurance marketplace gets more competitive, brokers must be more innovative than ever to set you apart from the competition.

Advanced Professional Managed Services are available to **employee benefits** broker clients:

- Under \$20k in annual premium
- Located in CA, OR, WA, AK
- Any industry, including cannabis

Why Advanced Professionals Managed Services?

Increased Profits



The Advanced Professionals model generates increased retention rates and enables more relationship development while significantly increasing client satisfaction.

Aggressive Growth



With Advanced Professionals, brokers can grow small account books without hampering service to key agency accounts. AP's program are customizable to individual needs to ensure aggressive growth and retention.

Integrated Technology and Support



Whether you choose to white-label our services or use our brand, clients get the same high-level customer service via our account staff and proprietary technology.

Set yourself apart from the competition

Learn more about how Advanced Professionals Managed Services can increase your value, profitability, service levels and more. Contact us at ManagedServices@advprofessionals.com