

Insurance Information Exchange (IIEX)

DTCC'S INSURANCE INFORMATION EXCHANGE (IIEX) TRANSFORMS RAW DATA INTO ACTIONABLE INSIGHTS

OVERVIEW

DTCC's sophisticated I&RS processing environment has evolved over 25 years into a powerful, interconnected suite of products and services. Over 600 clients and solution partners now use DTCC's I&RS every day to exchange large amounts of data throughout the lifecycle of insurance products.

However, with over 16 million insurance policy records processed daily, firms are challenged to make critical business decisions or respond to rapidly changing regulatory and reporting requirements.

DTCC's **Insurance Information Exchange (IIEX)** offers clients a standardized, alternative solution with one, secure platform to source, consume and transact policy, product and producer data of all insurance product types. Using IIEX, clients can research and quickly identify any missing data components, giving clients more time to focus on client relationships and sales.

IIEX also provides clients with the ability to create advanced searches, with analysis and intelligence around important metrics that can guide strategic business objectives. IIEX users (Carriers and Distributors) can have a view into their overall policy data completeness rate and filter to get specific insights by product type, trading partner or even at the individual policy level.

From within one platform, organizations using IIEX can create efficiencies, gain insights, make data-driven decisions and expand their business – and at the same time, reduce redundancy and risk, transforming a traditionally chaotic process into an orderly one.

CAPABILITIES

IIEX has a wide range of capabilities, with more enhancements in development. Current functionalities include:

- Near real-time, standardized data, consolidated in one secure platform
- Support for all insurance product types including annuities, life, and insurance-based retirement plans
- Policy, product and producer summary overview, details and transaction statuses
- Advanced search and transaction processing capabilities for policy, product, and producer information
- Insight into missing business critical data attributes with IIEX's Data Completion Score
- Self-managed administration for business-wide application
- Flexible access via user interface or purpose-driven APIs

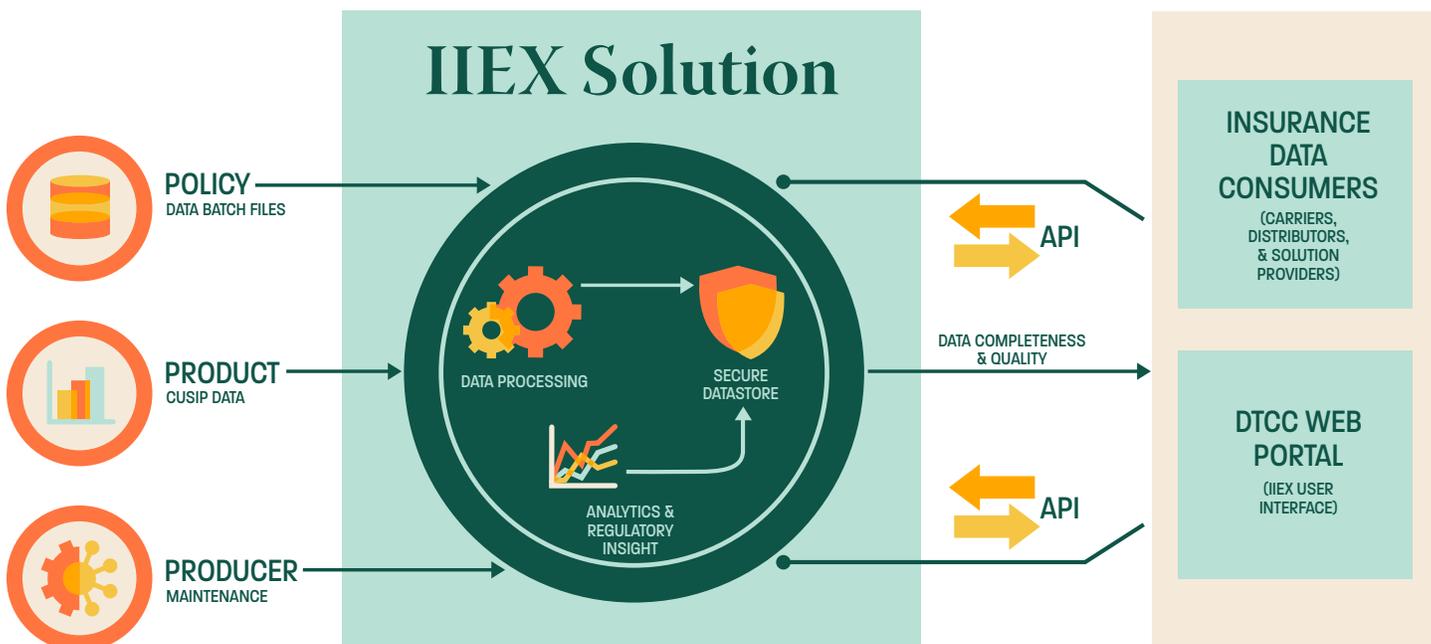
BENEFITS

IIEX can save clients time, money and reduce risk. Benefits include:

- Creates efficiencies by reducing the need to exchange data via multiple methods.
- Provides teams with more time to focus on client relationships and sales.
- Allows for holistic, data-driven decisions.
- Uses one, secure location for standardized data that allows for flexible permissioning options by user.
- Ability to quickly expand business using IIEX in different departments across the organization with unlimited users and self-managed administration.

HOW THE SERVICE WORKS

Accessible from a user interface and purpose-driven APIs, IIEX gives users the flexibility to source, consume and transact in-force policy, product and producer data as well as achieve insights into data quality completeness scores that leverage business defined critical attributes.



**IIEX's User Interface is accessible via the DTCC Web Portal and the IIEX APIs in the DTCC API Marketplace.*

Clients using the following I&RS products can view and/or transact data within IIEX:

- **Attachments (ATT)**
- **Financial Activity Reporting (FAR)**
- **Commission Schedule (CST)**
- **Fee & Expense (FET)**
- **Licensing & Appointments (LNA)**
- **Positions & Values (POV)**
- **Producer Authorization (PAR)**
- **In-Force Transactions (IFT)**

WHO CAN USE THE SERVICE

The IIEX platform is readily available to all I&RS clients and business partners who are members of DTCC's National Securities Clearing Corporation (NSCC).

IIEX APIs are also available to non-NSCC data vendors and solution providers to host for their clients. To learn more about IIEX APIs, please visit the [DTCC API Marketplace](#).

FOR MORE INFORMATION

Please reach out to your relationship manager, fill out a [contact us form](#) or email us at WMSConnect@dtcc.com.