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<b>P&amp;S#</b>	<b>8502</b>
<b>Date:</b>	<b>November 9, 2020</b>
<b>To:</b>	<b>ALL MEMBERS AND LIMITED MEMBERS</b>
<b>From:</b>	<b>Insurance &amp; Retirement Services</b>
<b>Attention:</b>	<b>MANAGING PARTNER/OFFICER, OPERATIONS PARTNER/OFFICER, MANAGER CASHIERS</b>
<b>Subject:</b>	<b>Launch of Insurance Information Exchange (IIEX)</b>

DTCC’s Insurance & Retirement Services (“I&RS”) is announcing the launch of **Insurance Information Exchange (“IIEX”)**, a new API-enabled platform that will allow clients to centralize and exchange their policy, producer, and product data using an easy, flexible and secure data hub to support the sourcing and consumption of data. Access to in-force policy data in IIEX will be readily available, on-demand, through a user interface, via DTCC Portal, as well as an API-enabled platform.

Benefits of IIEX will include:

- Centralized data hub that will provide a standardized alternative to the need for sending large, redundant batch files
- Users will be able to access easily consumable, purpose-driven and in-force policy data files
- Additional phases will expand on the data offering across policy, producer and product details and will expand the data sourcing and delivery capabilities using new technologies
- Offers a solution for all insurance product types - annuities, life insurance and insurance-based retirement plans
- Stay compliant, meeting industry data standards through reactive regulatory changes
- Flexible, secure platform with API capabilities

Starting **November 9, 2020**, IIEX will be offered to I&RS members that are part of the pilot group that has been working on the development of IIEX with I&RS. IIEX will be offered to the pilot group in November and December 2020 in order to finalize testing in a production environment.

On **January 1, 2021**, IIEX will be offered to all I&RS members and their service providers. For more information on IIEX, please visit the IIEX product page at <https://www.dtcc.com/wealth-management-services/insurance-and-retirement-services/insurance-information-exchange>. Questions regarding IIEX or this Important Notice may be directed to your I&RS Relationship Manager.

DTCC, on behalf of its subsidiaries, offers enhanced access to all important notices via a Web-based subscription service. The notification system leverages RSS Newsfeeds, providing significant benefits including real-time updates and customizable delivery. To learn more and to set up your own DTCC RSS alerts, visit [http://www.dtcc.com/subscription\\_form.php](http://www.dtcc.com/subscription_form.php).