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Date:	April 20, 2021
To:	ALL MEMBERS AND LIMITED MEMBERS
From:	Insurance & Retirement Services
Attention:	MANAGING PARTNER/OFFICER, OPERATIONS PARTNER/OFFICER, MANAGER CASHIERS
Subject:	Insurance Information Exchange (IIEX) Enhancements

DTCC’s Insurance & Retirement Services (“I&RS”) is announcing enhancements to the recently launched **Insurance Information Exchange (“IIEX”)**, an API-enabled platform that allows 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 is readily available, on-demand, through a user interface, via DTCC Portal, as well as an API-enabled platform.

The enhancements will be implemented on **May 27, 2021** and will include:

- The ability to view and download carrier product level information via the IIEX user interface
- The ability to access carrier product level information via API’s
- The ability to view and download historical policy level financial transaction information via the IIEX user interface
- The ability to access historical policy level financial transaction information via API’s

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.

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