



A#:	9035
P&S#	8608
Date:	August 6, 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 following enhancements will be implemented on **September 16, 2021:**

- Enhanced user interface aesthetics
- The ability to manage service bureau access to IIEX
- Improved administrative capabilities including saved contra groupings

The following enhancements will be implemented on **November 18, 2021:**

- Advanced search capabilities via the user interface and API’s
- The ability to access data quality and policy overview data 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.

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.