CRUMMEY SERVICE
America's Leading ILIT Software Company

System Features at a Glance

Notices Types
Crummey Notice
Funding Advice [1]
Premium Due Reminder [1]
Annual Gift Summary
Policy Review Reminder
Beneficiary Acknowledged Gift
Funds Available
Default text provided for all notices
Ability for user to modify default text for all notices
Automated creation and delivery of notices

Financial Tracking
Transactions permanently recorded and available on-line
    Gifts to trust
    Policy Payments
    Misc Charges/Credits
Track beneficiary allocations
Unallocated gifts
5x5 and variable beneficiary percentage allocations

Data Retention/Storage/Delivery
All Financial Transactions are available online
Permanent retention of trust documents
All delivered notices available online
Unlimited delivery of notices via email
USPS delivery of notices [2]
Unlimited number Beneficiaries
Unlimited number of Policies
Track 5x5 and Hanging powers
24x7 Site access
Customizable Trust Dashboard
Site Access available for Trust participants
      (i.e.: Beneficiary, Trustee)

Trust Information
Unlimited Policies
Unlimited Beneficiaries
Unlimited Trustees, insured, grantors
Unlimited Role Types for Advisors

Site Configuration
Control of user access and data visibility
Control of rules for Notice Escalation
Unlimited number of Corporate subdivisions
Upload of policy premium adjustments

Security
Data Backup and disaster recovery
SAS 70 Level II Secure Facility
Certified Secure Application

Reporting
Trust Detail Report
Policy Detail Report
Ad-Hoc Trust Report
Ad-hoc Policy Report
Trust Gift Detail Report
Beneficiary Detail Report
GST Report

Branding
Co-Branding
Custom branding of reports and notices

Billing
Direct or 3rd party billing

Support
Technical Support [3]
Customer Service Telephone Support [4]

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[1] Notices include 3 levels of escalation

[2] Charges may apply if agreed usage limit exceeded

[3] Normal business hours. 24x7 support for critical issues

[4] Normal Business hours

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