



MAGNUM
SOFTWARE

Insurance Automation Software, Built for Distributors

We partner with carriers, MGAs, wholesalers, and agencies to build the distribution system their program needs, then run it as cloud software.

QUOTE TO CASH

Who We Build For

- **Carriers** launch a new program without building a system from scratch.
- **MGAs and program administrators** get their own rates, forms, and program rules live in weeks.
- **Wholesalers** quote, bind, and issue in one place across their carrier panel.
- **Agencies and their brokers** get a cleaner submission path: fewer emails, faster answers.

What We Do

Form → Rating → Quote → Documents → Signatures → Payments → Issuance

Rapid Market Entry

Your own distribution system, tailored to your program and deployed fast. No challenge too great or small.

Cloud-Native SaaS

Built for the cloud from the ground up. Your team works from anywhere, on any device.

End-to-End Automation

Rating, quoting, underwriting, binding, and issuance in one system, from first click to bound policy.

AI-Powered Tools

Intelligent OCR, AI form building, and competitor application migration built into the platform.

Capabilities

RATING & QUOTING

- ✓ Raters and comparative rating
- ✓ Quote packets
- ✓ Web services and API access
- ✓ Finance agreements

DOCUMENTS & ESIGN

- ✓ Document handling and approval
- ✓ eSignatures and digital execution
- ✓ Payment processing
- ✓ Compliance-ready audit trail

UNDERWRITING & BINDING

- ✓ Submissions intake
- ✓ Underwriting workflow
- ✓ Binding
- ✓ Audits

SERVICING & REPORTING

- ✓ Policy issuance
- ✓ Endorsements and cancellations
- ✓ Automated renewals
- ✓ Reporting and CRM tracking

AI, Live Today

AVAILABLE NOW

- ▶ Document automation and intelligent OCR
- ▶ Competitor application acceptance (AI migration)
- ▶ AI chatbot, client-facing
- ▶ AI form designer
- ▶ AI form-to-rater connection
- ▶ AI process flow builder

Competitor application acceptance is the differentiator most platforms do not offer: bring an existing book onto the platform without rekeying it.

COMING SOON

- ▶ Smart reporting **COMING SOON**
- ▶ AI-assisted underwriting **COMING SOON**

Why Magnum

We are a small team, and that is the advantage. You talk directly to the people who build and run the software, not a ticket queue.

- ▶ Direct access to the people who build it
- ▶ Decisions in days, not quarters
- ▶ Nothing sits behind an enterprise backlog
- ▶ Your launch date treated as our own

Our Products

InsuranceClouds

The distribution platform. Rating, underwriting, policy issuance, endorsements, and AI automation in one system.

LeadRobin

Automated lead distribution. Inbound leads arrive by email, get deduplicated, and are routed to the right broker automatically.

DocInspect

Document verification API. Checks signatures, dates, and cross-document consistency in one pass.

Deployment & Support

- ▶ Browser-based, nothing to install on your machines
- ▶ Your team works from anywhere, on any device
- ▶ Training videos included with the platform
- ▶ Support desk at support.magnumsoftwareservices.com

Our Commitment

We hold ourselves accountable to you, our partners, and our employees. We honor our commitments and hold a high bar for quality, because we are only successful when you are. The cost of Magnum Software is extremely low, so you have almost no risk. Let us show you what we can do, risk-free.

Get in Touch

Magnum Software Services · 1155 Sportfisher Dr., Suite 140, Oceanside, CA 92054

Phone: (800) 732-7475

Email: info@magnumsoftwareservices.com

Web: www.magnumsoftwareservices.com · www.insuranceclouds.com · support.magnumsoftwareservices.com

Book a demo: cal.com/magnumsoftwareservices