

Insights

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Case Study: Cavitch, Familio & Durkin Co.

Lindsey Smith of Cavitch, Familio & Durkin Co. was all too familiar with the anxieties that are often associated with life insurance policy management. Because he didn't have a centralized location with well-organized data for all the policies entrusted to his company, he was not confident that policy performance was being properly supervised. Mr. Smith discovered Proformex and can now rest easy knowing that the Proformex inforce policy management platform is keeping close watch of all his clients' policies and that he will be immediately notified if something falls off track. See how Proformex improves the firm's operations through automation in the video below.

