

The background of the image features a complex network of thin, light gray lines connecting numerous small, glowing white dots. These dots are scattered across the entire frame, creating a sense of a global or digital network. The lines vary in length and orientation, forming a web-like structure that is more dense in some areas and sparser in others. The overall effect is one of connectivity and technology.

|| INTEGRITY®

ALL-IN-ONE Platform

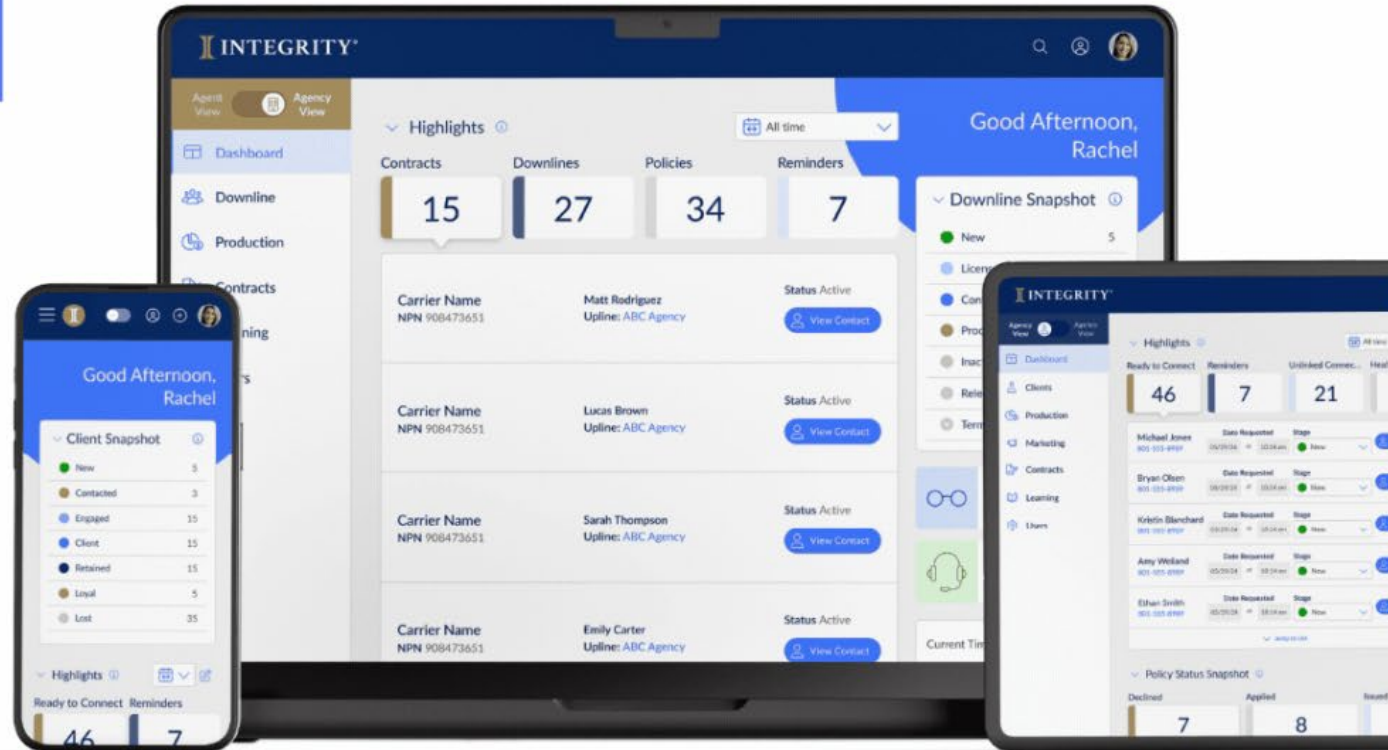
World-Class Technology Solution

Everything you need to serve your clients.
Powered by one login and password.



Best-in-Class CRM

**Built by Agents.
For Agents.**
Built to help you work smarter.



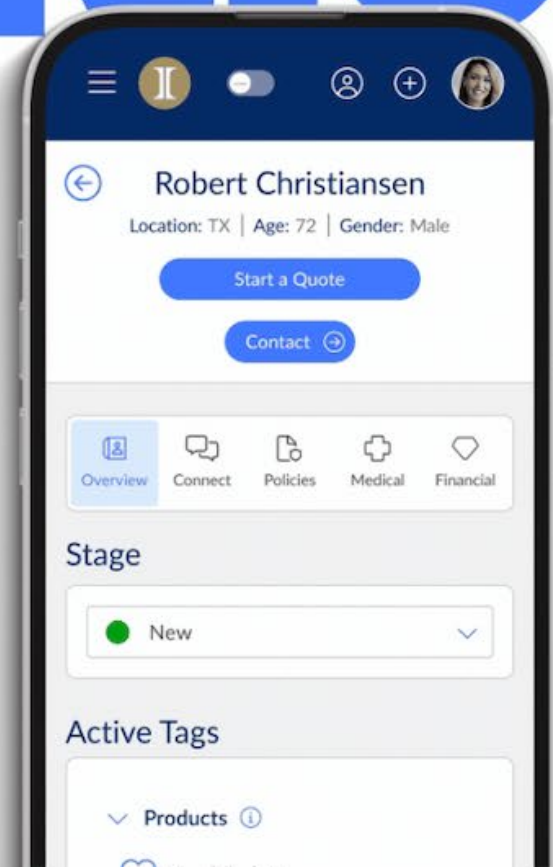
Stress-free Organization

Quickly Find Clients

Ask Integrity automatically adds tags to clients to help you find them quickly.

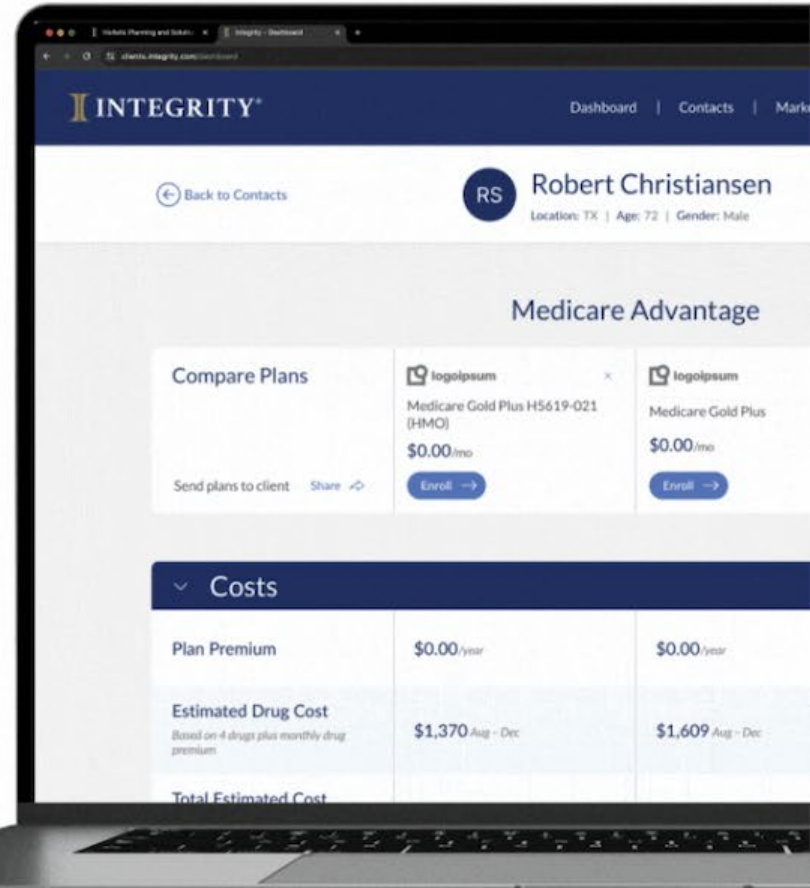


Ask Integrity®



Quote Multiple Products

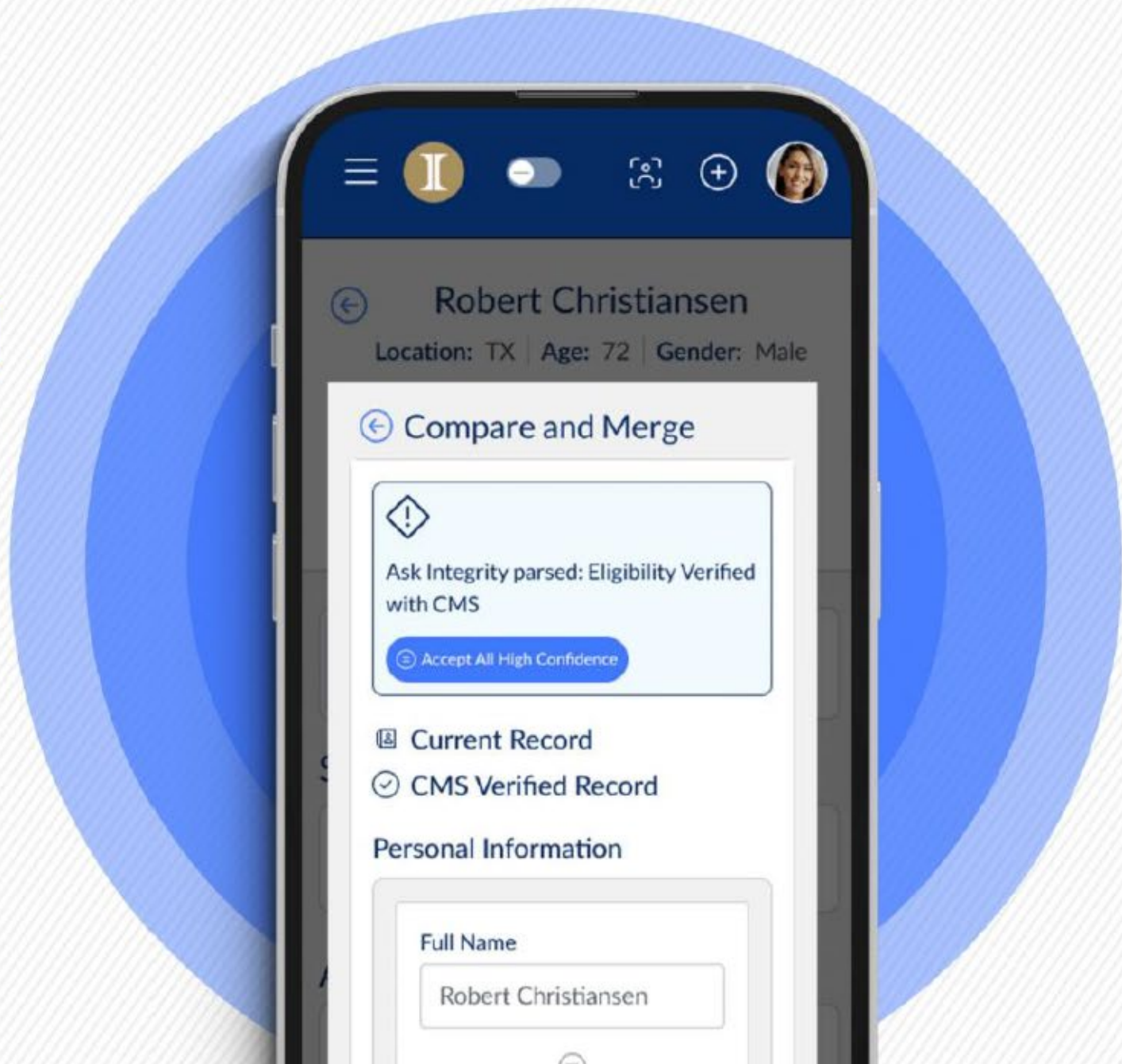
**Quote Multiple Products
for Multiple Health Carriers**



Check. Quote. Close.

**Instant Medicare & Medicaid
eligibility verification!**

- ✓ **No switching platforms**
- ✓ **No extra steps**
- ✓ **Find the right plan, *faster***



Expanded Quote Filters



Commission Status



Core Benefits



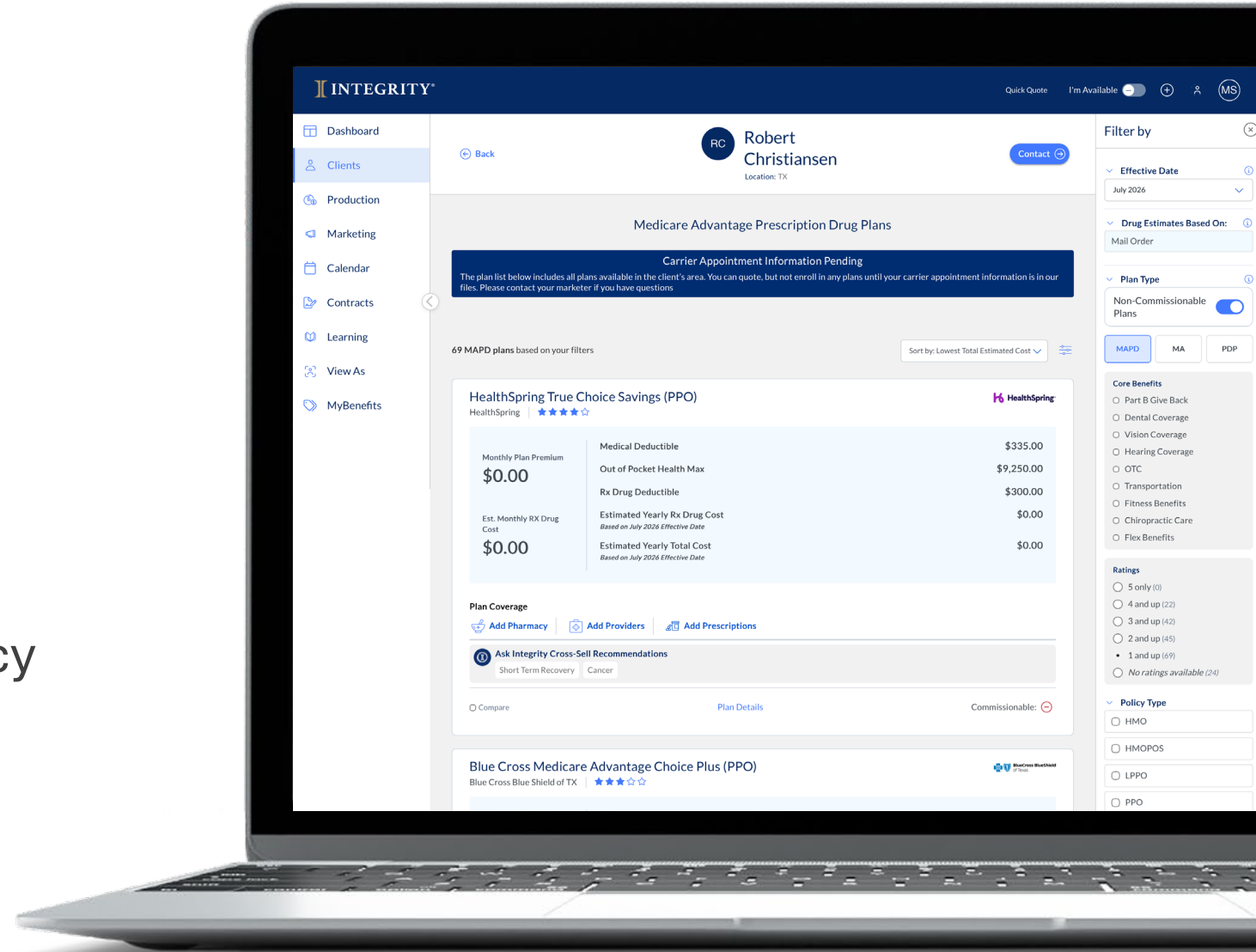
Star Ratings



Special Needs Plans

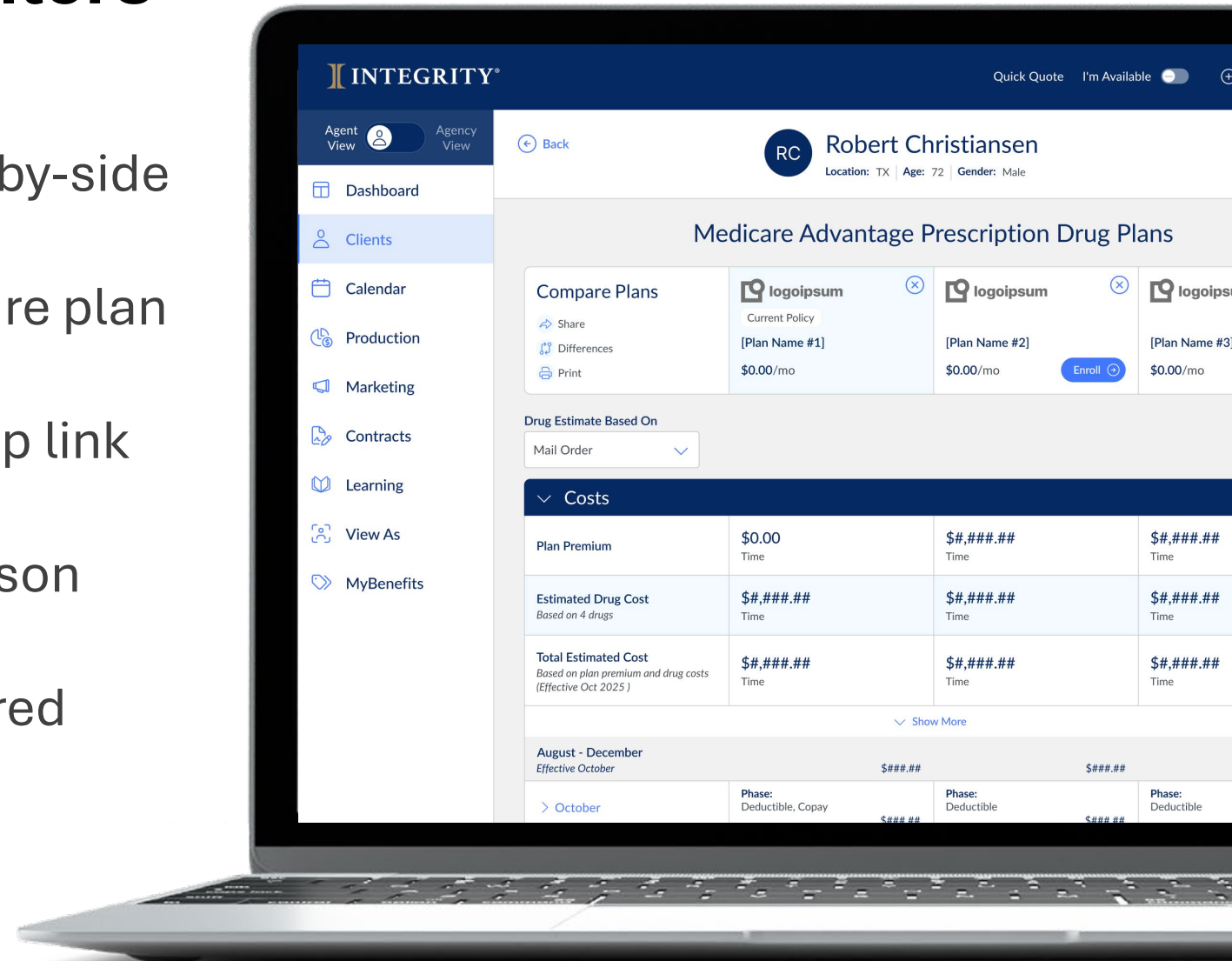


Doctor, Rx & Pharmacy



Expanded Quote Filters

- ✓ Compare any plan side-by-side
- ✓ Compare current to future plan
- ✓ Send one plan with e-app link
- ✓ Download PDF comparison
- ✓ Plan Benefits Restructured

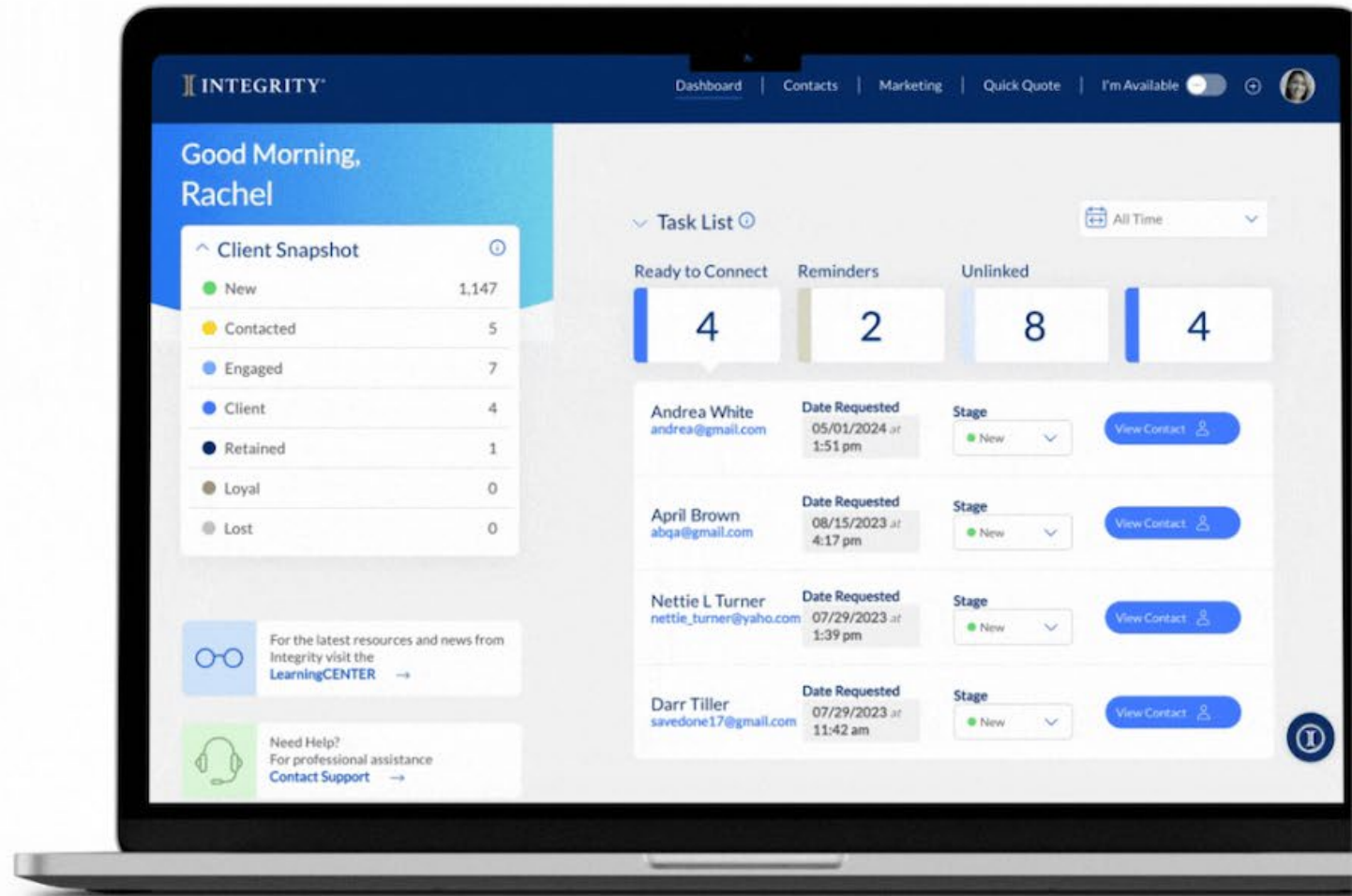


Makes It Easy

Quote & eApp

Sign in once for quoting and application submissions.

Client information is filled in automatically!



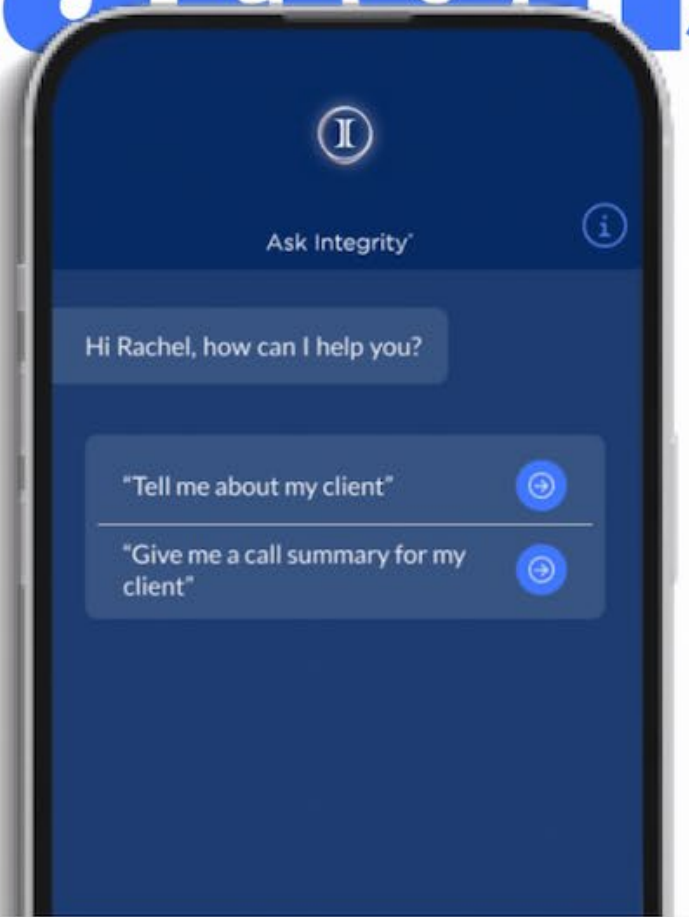
AI-Powered Recommendations

Expert Guidance

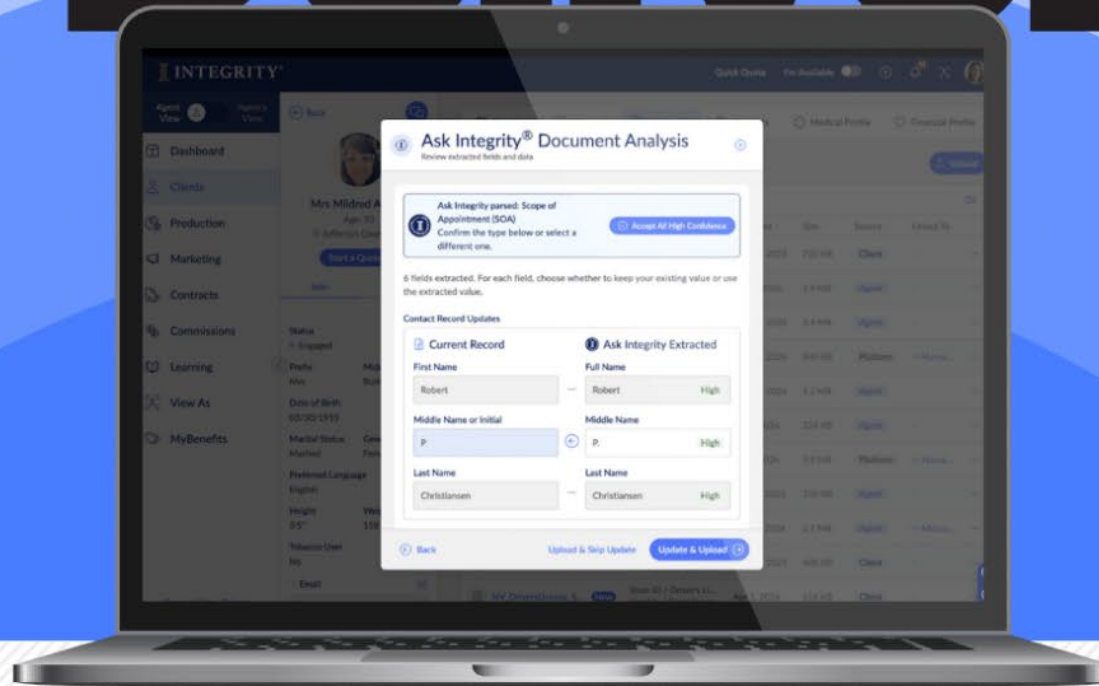
Suggests products that complement current client coverage.



Ask Integrity®



You Upload. AI Delivers!



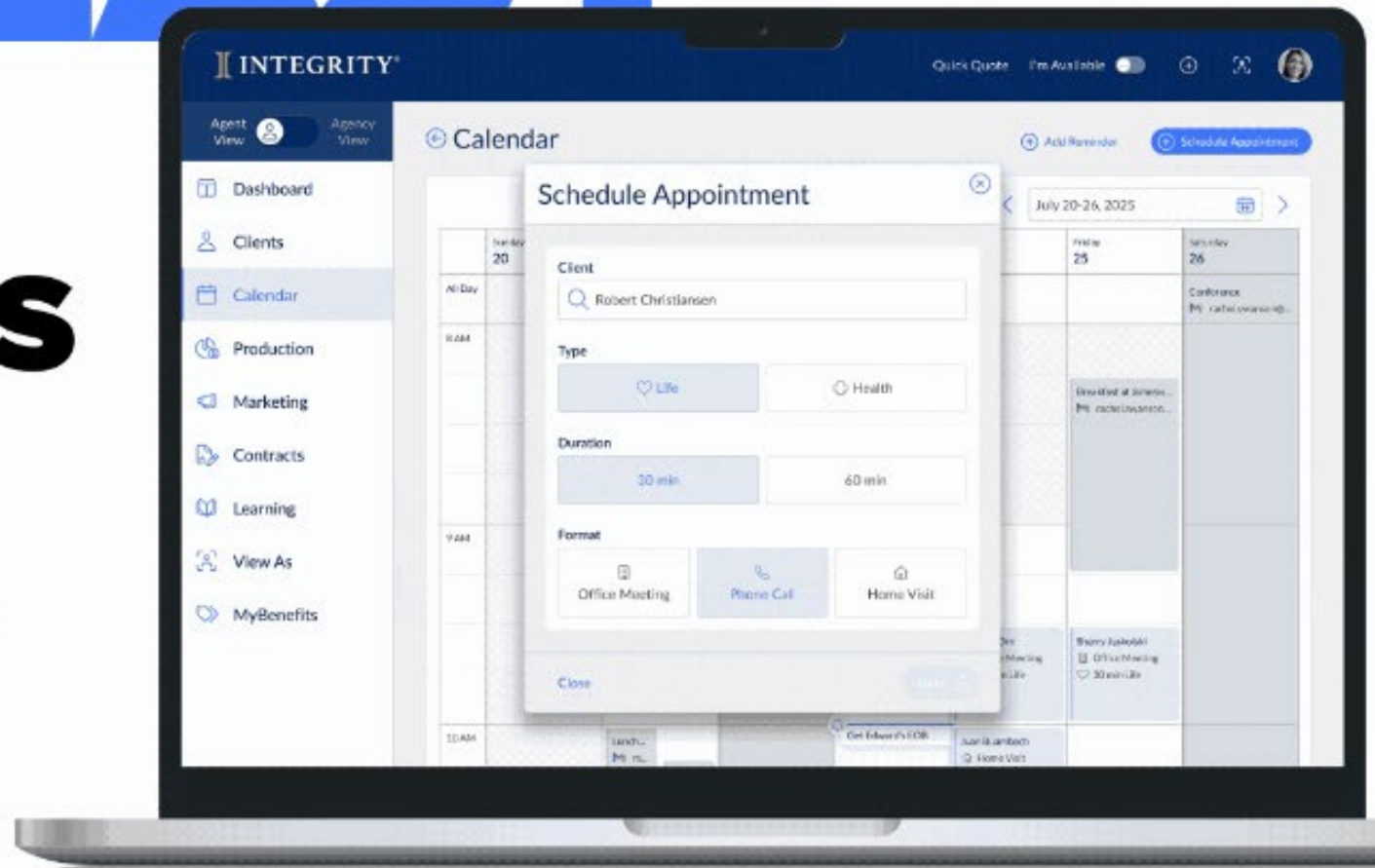
From paperwork to policy, never miss a beat.
Smart Documents powered by Ask Integrity® AI!

SCHEDULING MADE EASY

**BOOK
APPOINTMENTS
YOUR WAY!**



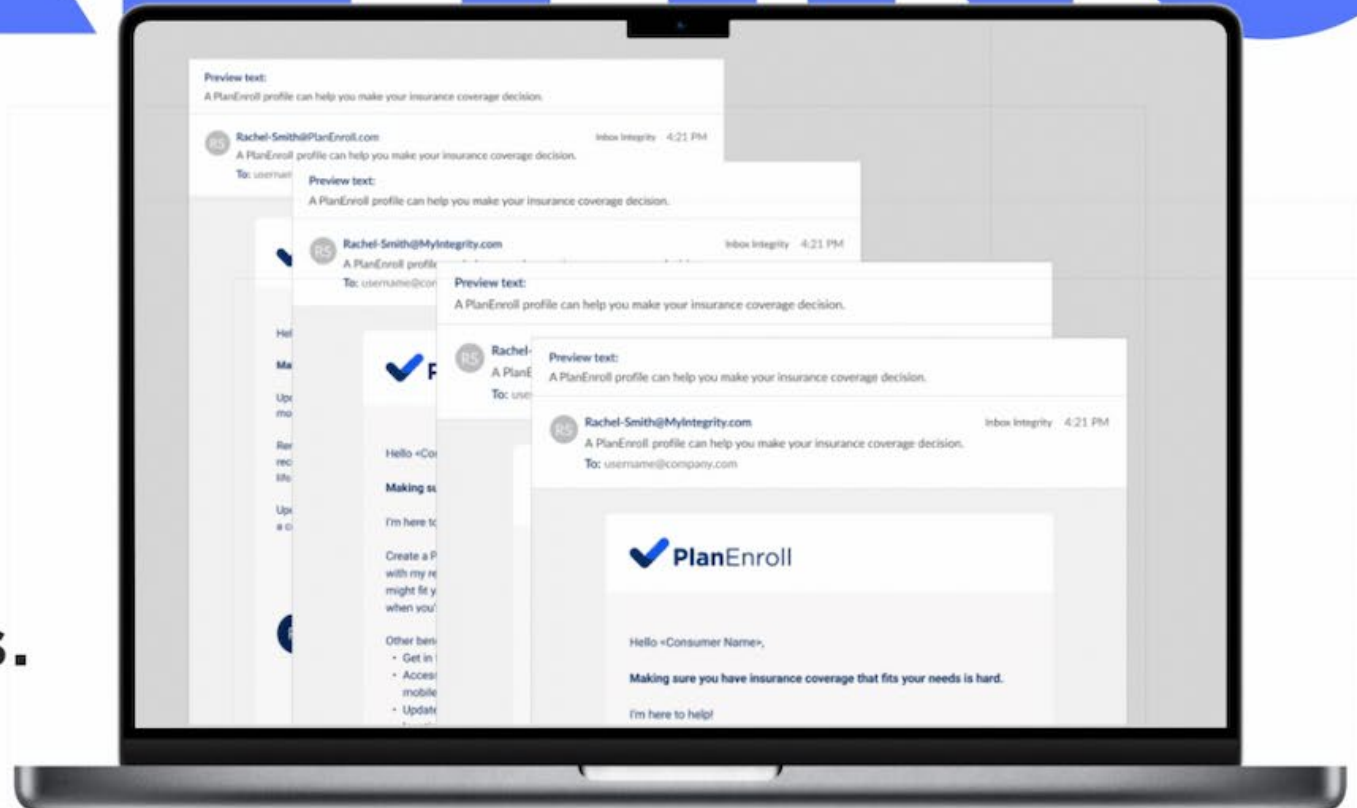
**Instant reminders —
so you can focus
on serving**



AUTOMATED MARKETING

**Email & text
your clients**

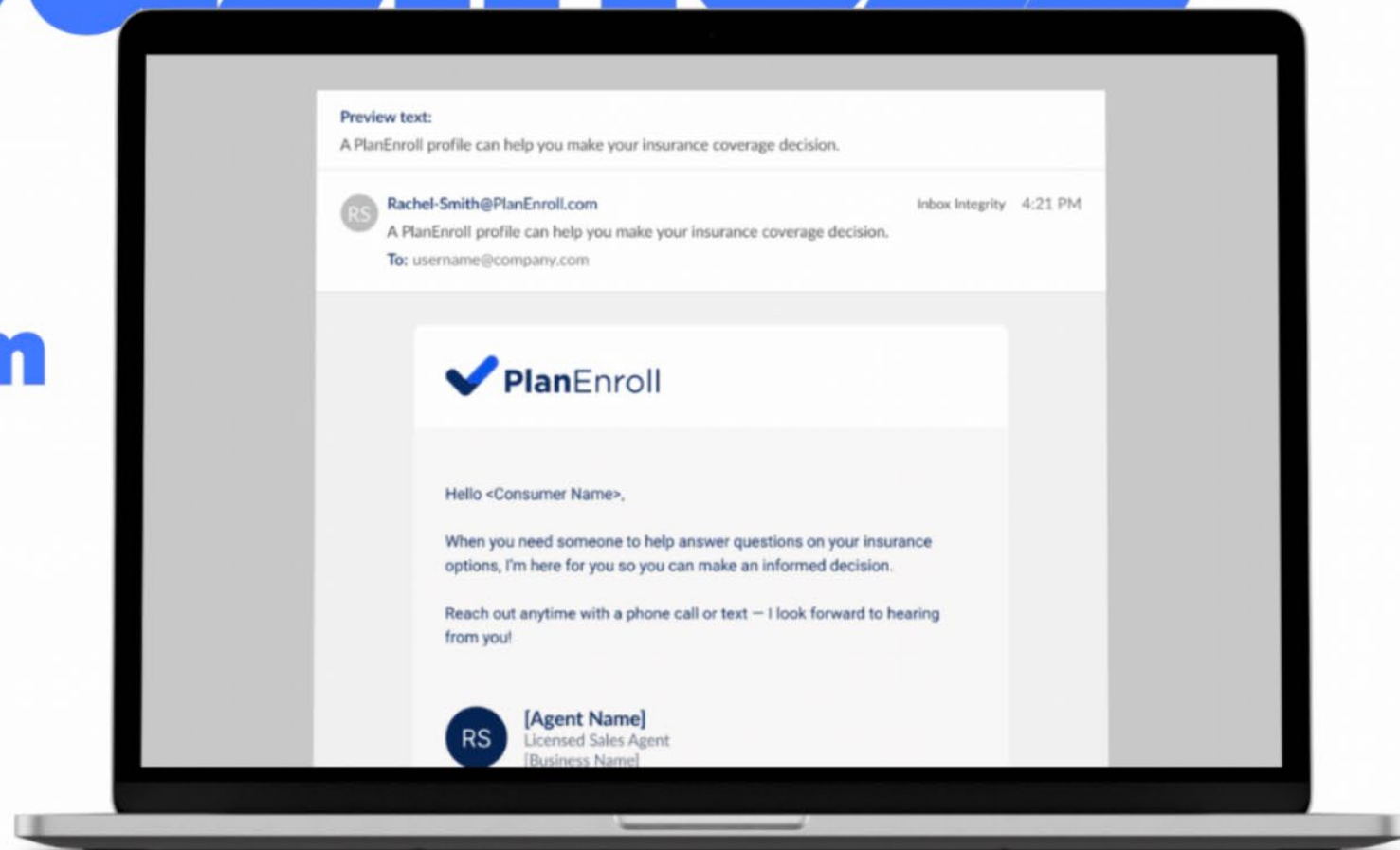
Automatically send reminders.



Professionalize your business

Your **PlanEnroll.com** Email Address

Reach your clients directly with
personalized messages.

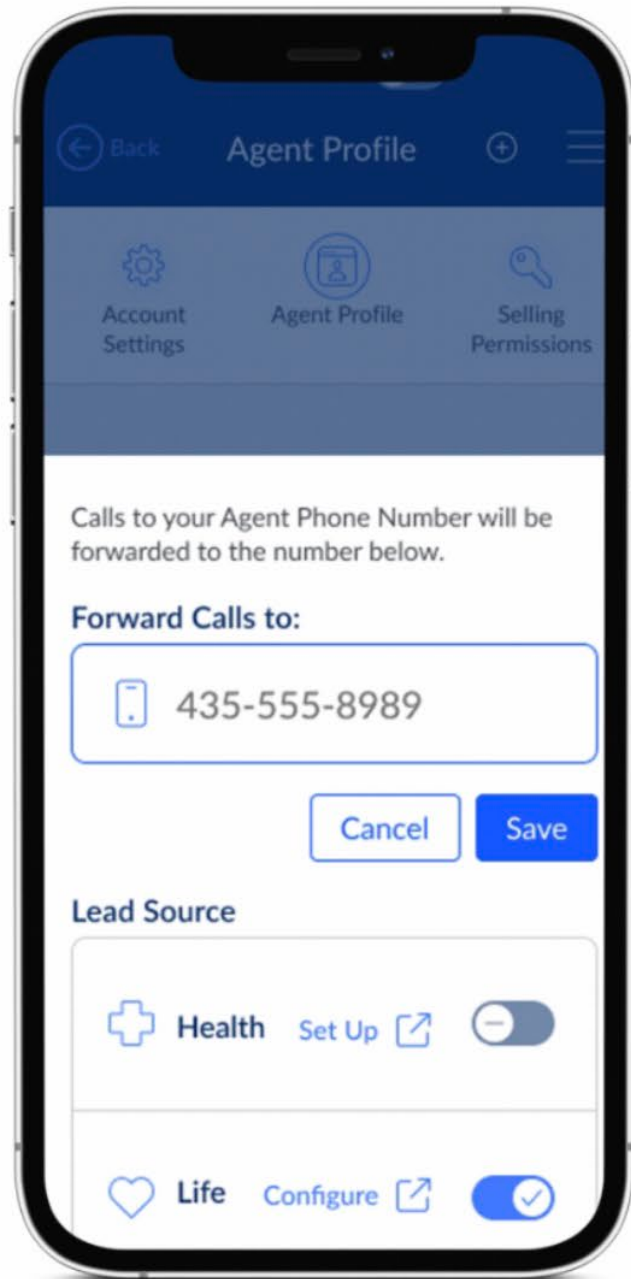


Compliance made easy!

We've got your back.

**Solutions to help protect you and
your business.**





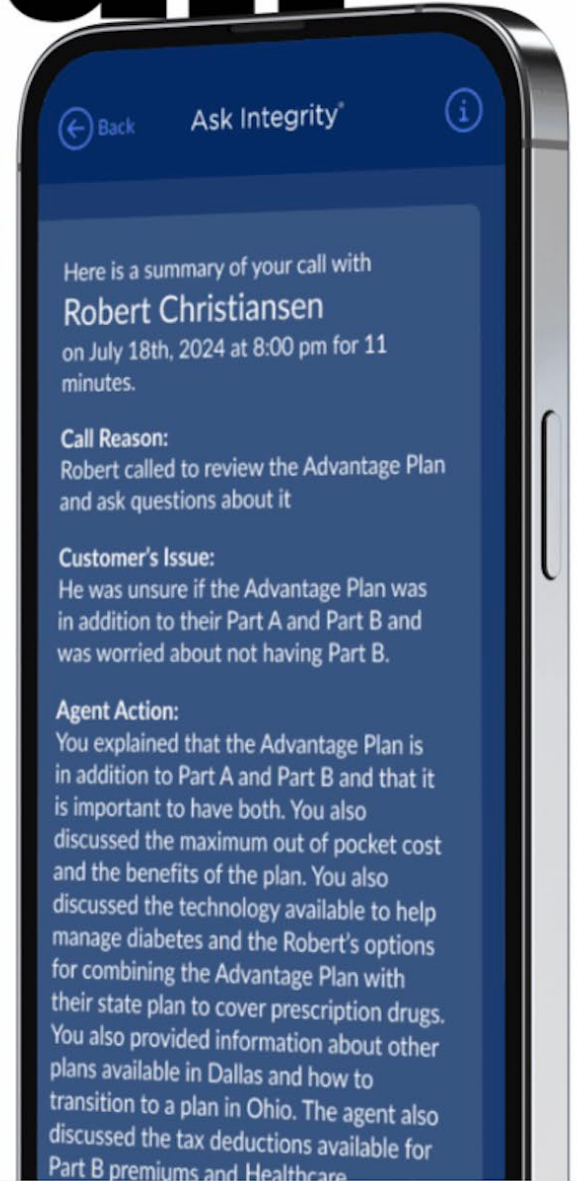
Success is calling Personalized Business Phone Number

Meeting summaries and transcripts powered by
your unique personalized phone number!

Meeting & Call Summaries

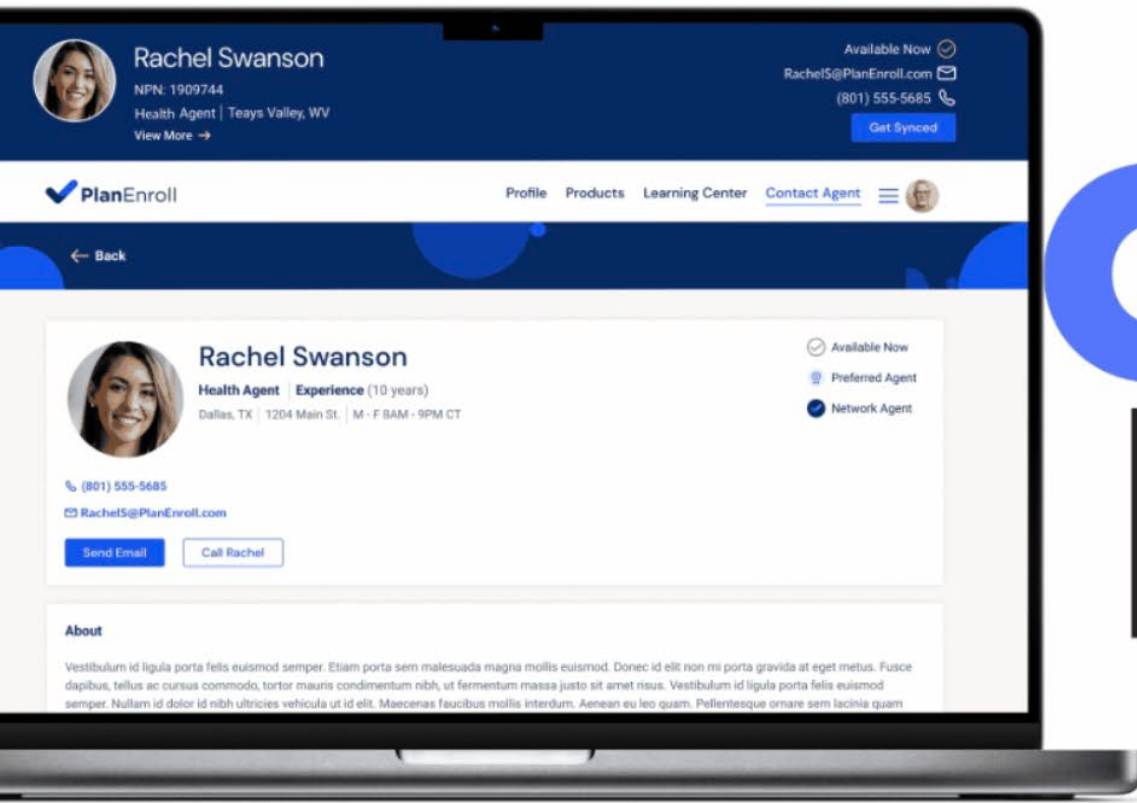


Summarizes prior client meeting
details with one click!



Personalized Website

Agent-personalized website and enrollment platform.



Grow Your Business

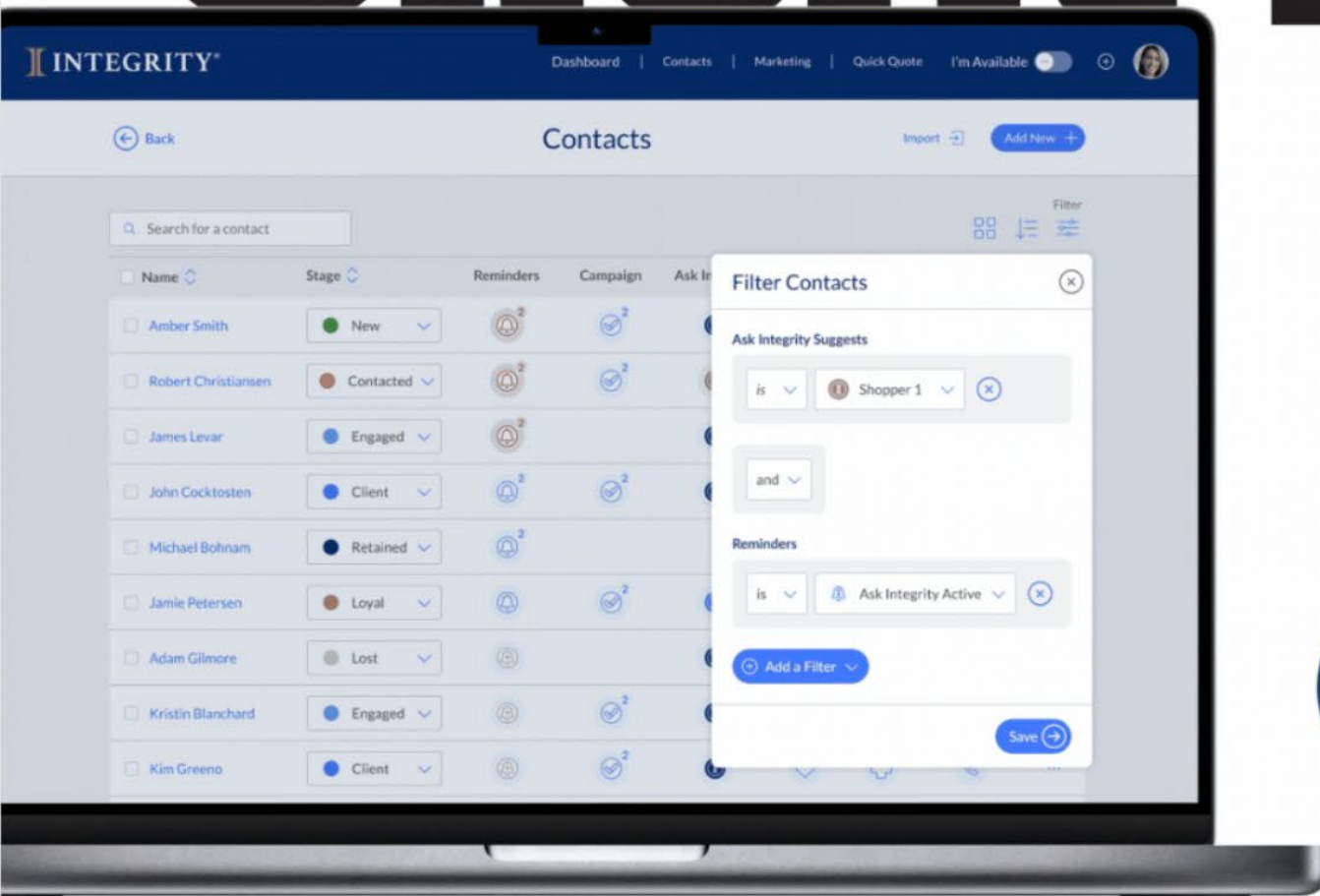
Less Stress More Success

**Better manage
your clients.**

**Collect key client information
with Client Sync!**

The screenshot displays the PlanEnroll Client Sync interface. At the top, a dark blue header contains the agent's profile: Rachel Swanson, NPN: 1909744, Medicare & Life Agent | Teays Valley, WV, with a 'View More' link. To the right, it shows 'Available Now' with a checkmark, email 'RachelS@company.com', and phone '(801) 555-5685'. Below the header, a light blue navigation bar includes 'PlanEnroll' with a checkmark icon, and links for 'Products', 'Find an Agent', 'Learning Center', 'Sign Up', and a menu icon. A progress bar below the navigation bar shows four steps: 'My Info' (selected), 'Health', 'Life', and 'Prescriptions'. The 'Health' step is further detailed with sub-steps: 'Pharmacy', 'Doctors', 'Prescriptions', 'Coverage', and 'Meet'. The main content area is a light pink box with the question 'What prescriptions do you currently take?'. Below the question, it states: 'Prescription drug coverage and costs can vary widely. Add your prescriptions for more accurate coverage estimates.' At the bottom right of the box is an 'Add New' button with a plus icon. At the bottom left, there is a 'Brand' input field and an 'Edit' link with a pencil icon.

Know Every Client Better

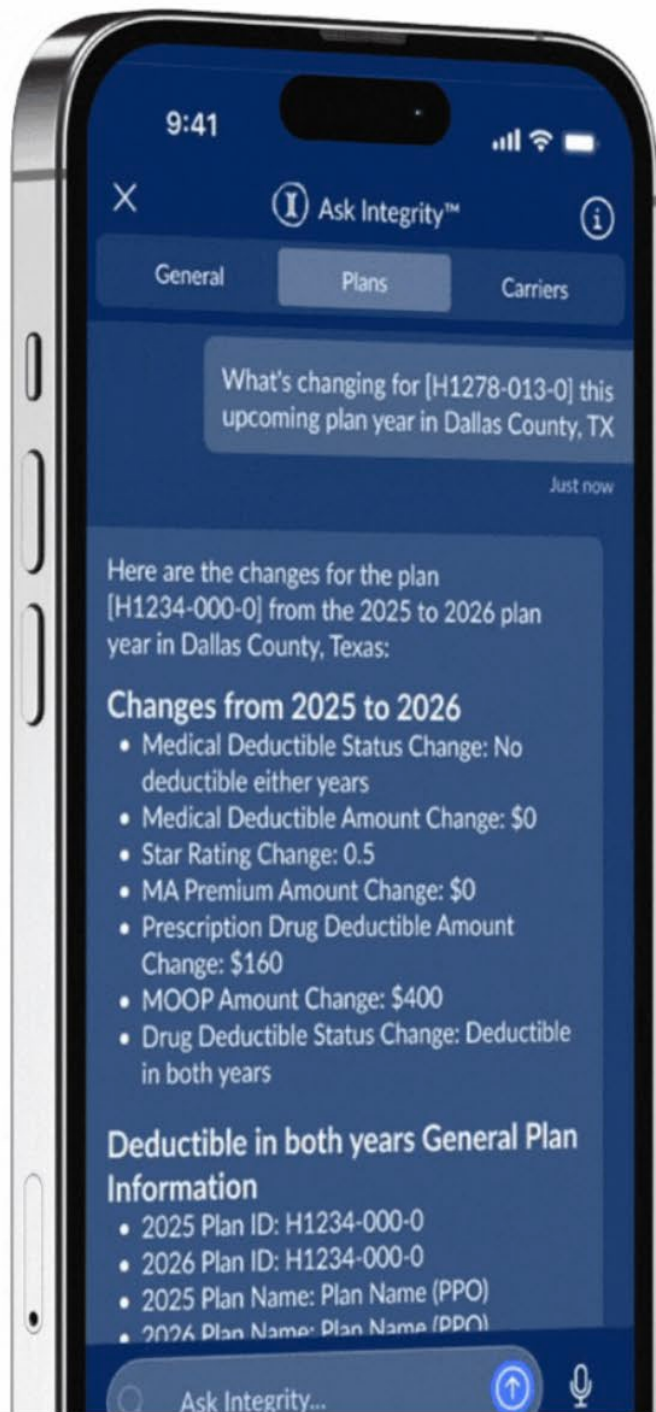


Shopper Tags

Insight into clients expected to experience plan disruption. Instantly see which clients need your help the most!



Ask Integrity®



Timely Insights



Ask Integrity®

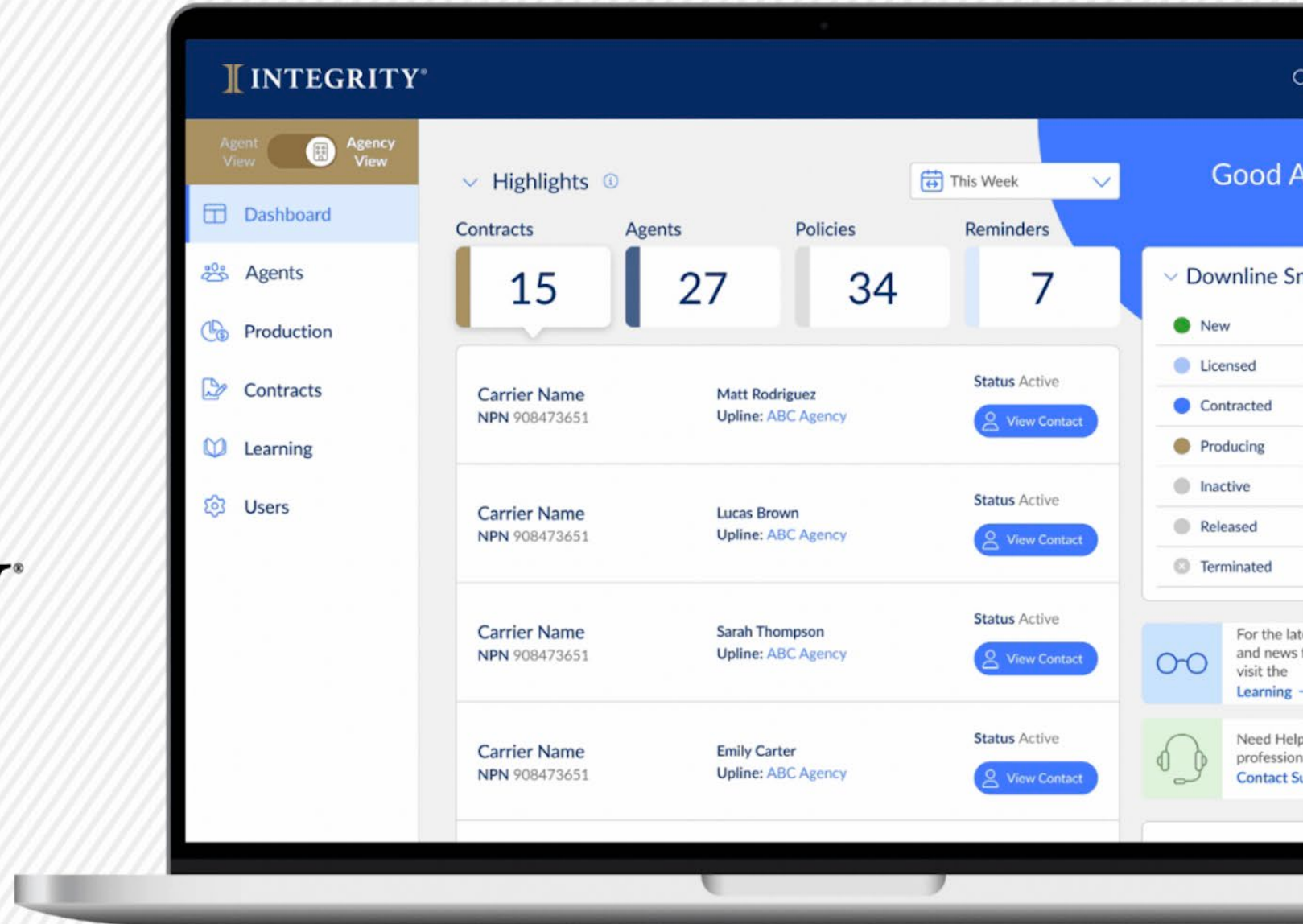
Plan Insights

**No more headaches trying to remember
every plan detail!**

Integrity for Agencies



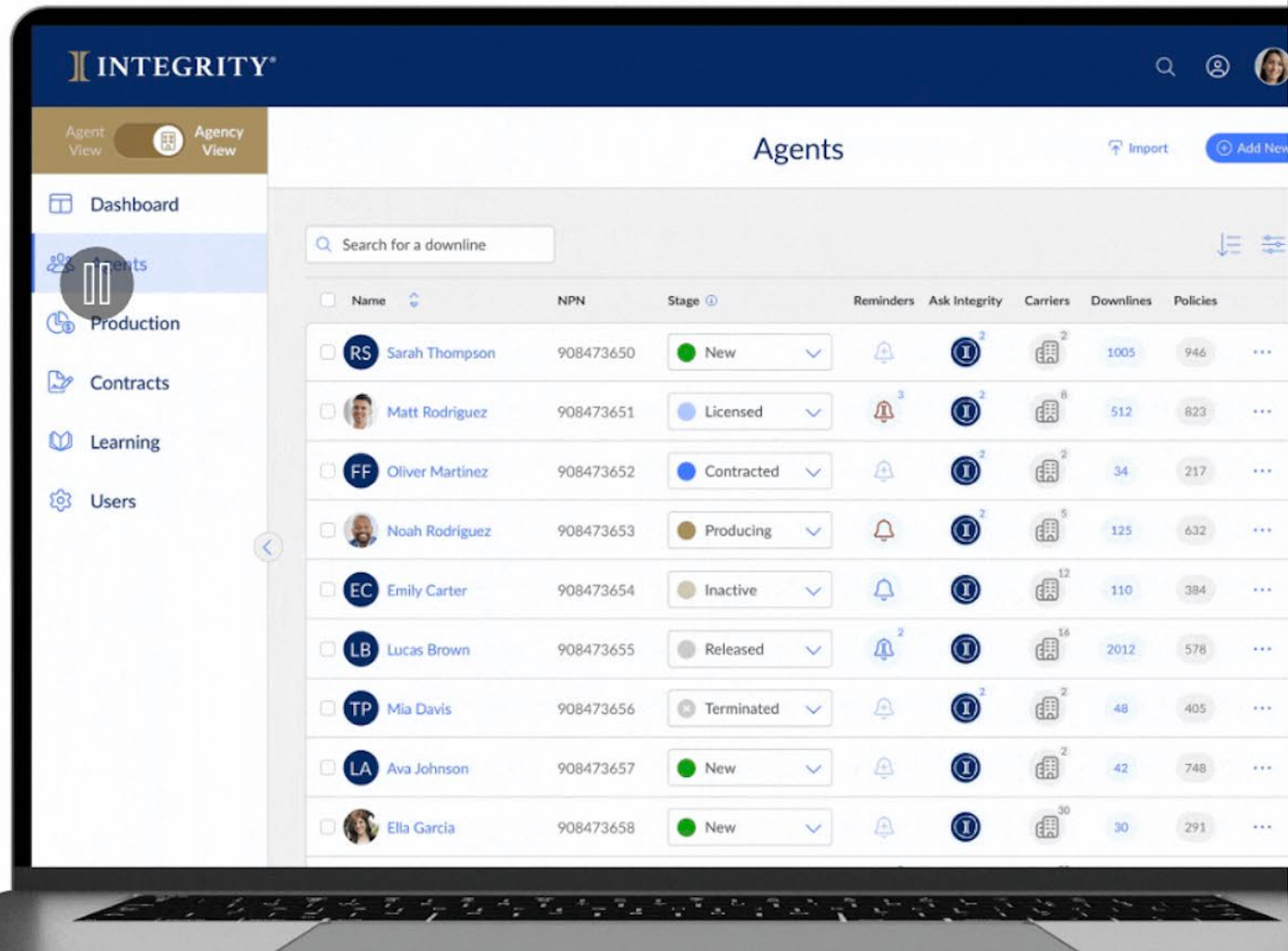
INTEGRITY[®]
CONNECT+



Smart Insights

Clear Visibility

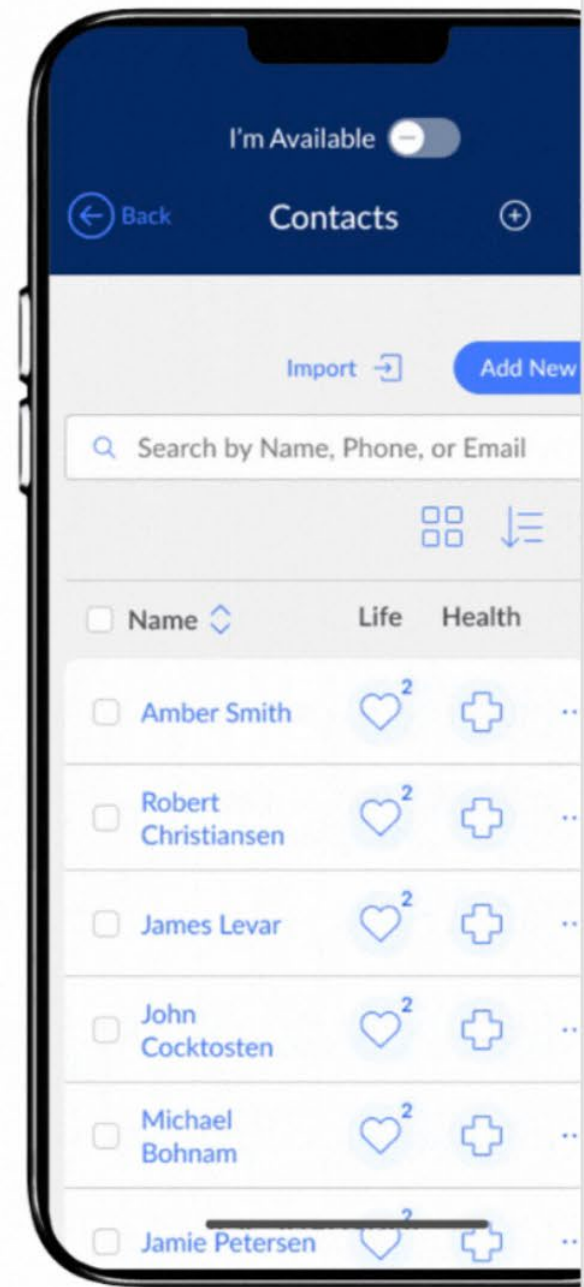
See key activities including production, contracting and hierarchy.



Work Anywhere

Integrity for Agents Mobile App

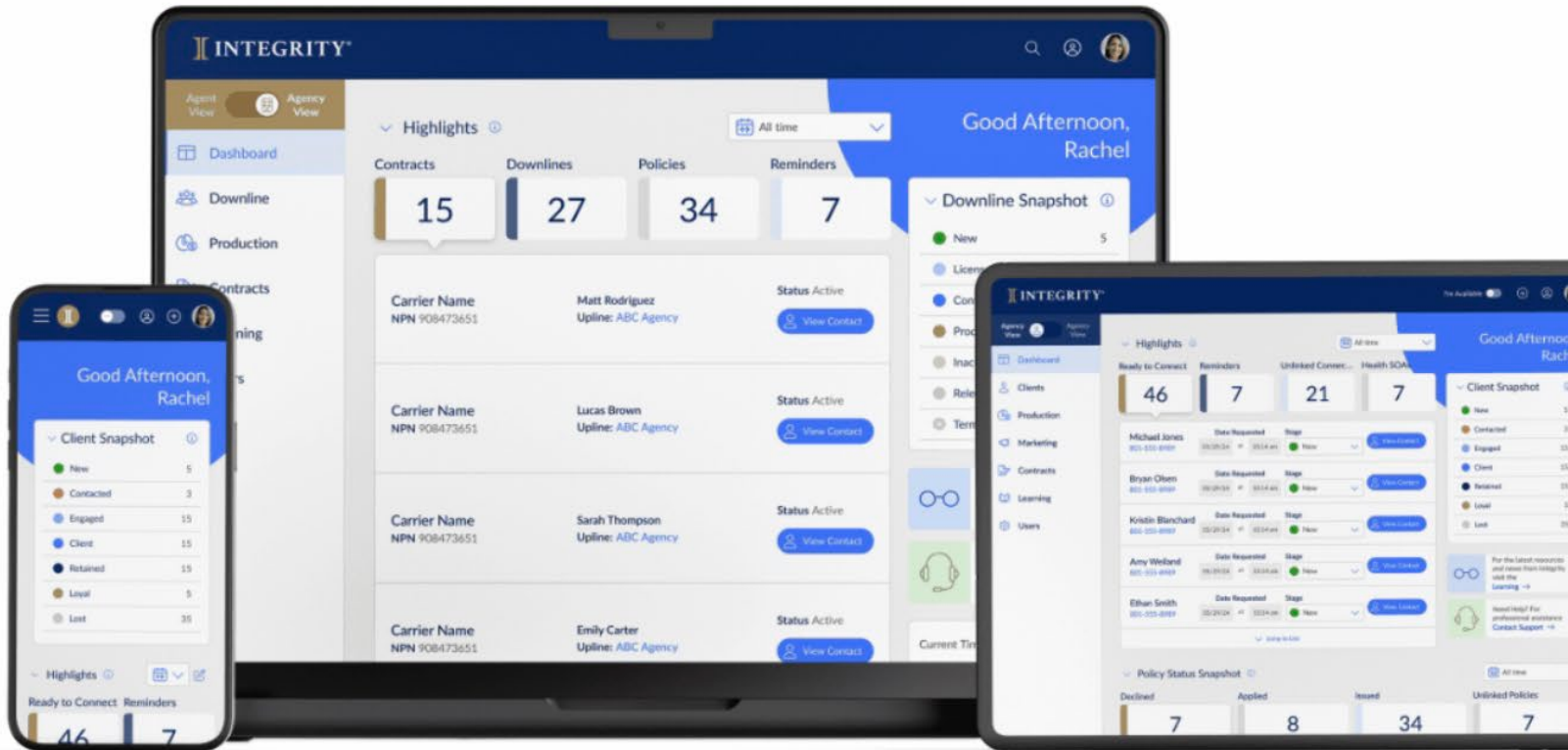
Powerful app is available on Apple & Google Stores.



Invested in your success

**YOU are at
the center**

**We support you so you
can support your clients.**



Access Exclusive Benefits

verizon



OfficeMax®

Staples

American Airlines

Marriott

DELTA



Disney



Microsoft

Apple



Uber

enterprise



SAMSUNG

Vrbo

 Production

 Marketing

 Contracts

 Learning

 View As

 MyBenefits

The Integrity Health Plan Health insurance built for you.

ENROLL NOW



SAVE BIG
on Brands You Love



Start Saving →

Save up to 50%
on E&O Insurance
With IntegrityCONNECT

Apply Now →

INTEGRITY
AHIP
Certification



Start Saving →



INTEGRITY
Continuing Education
Powered by REG ED

Start Saving →

Coming soon to IntegrityCONNECT to save agents' time

IntegrityCONNECT Marketing AI Autopilot

Turns every agent into their own AI-powered marketing agency — nurturing and follow-up campaigns, co-branded.

Your Clients, Your Message.

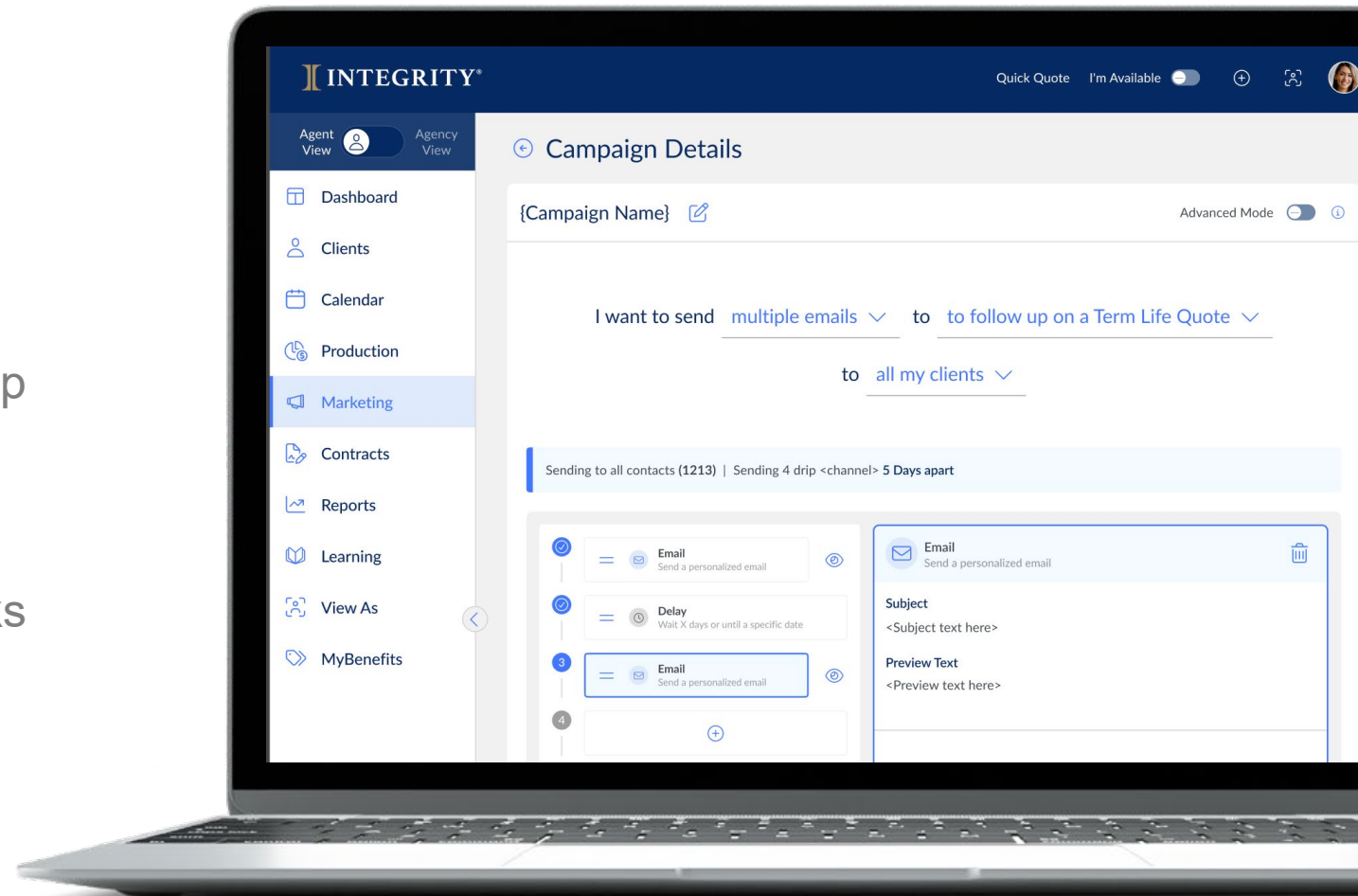
Co-branding with your agency — builds client trust.

Marketing AI-Templates.

AI-suggested templates for trigger and drip campaigns.

Custom Content, Compliantly.

Custom content with AI compliance checks before send.



Coming soon to IntegrityCONNECT to save agents' time

IntegrityCONNECT Holistic Quote Engine

Industry-only platform lets cross-contracted agents switch between Health and Life from one client profile. Enter data once, quote everything.

Holistic Coverage.

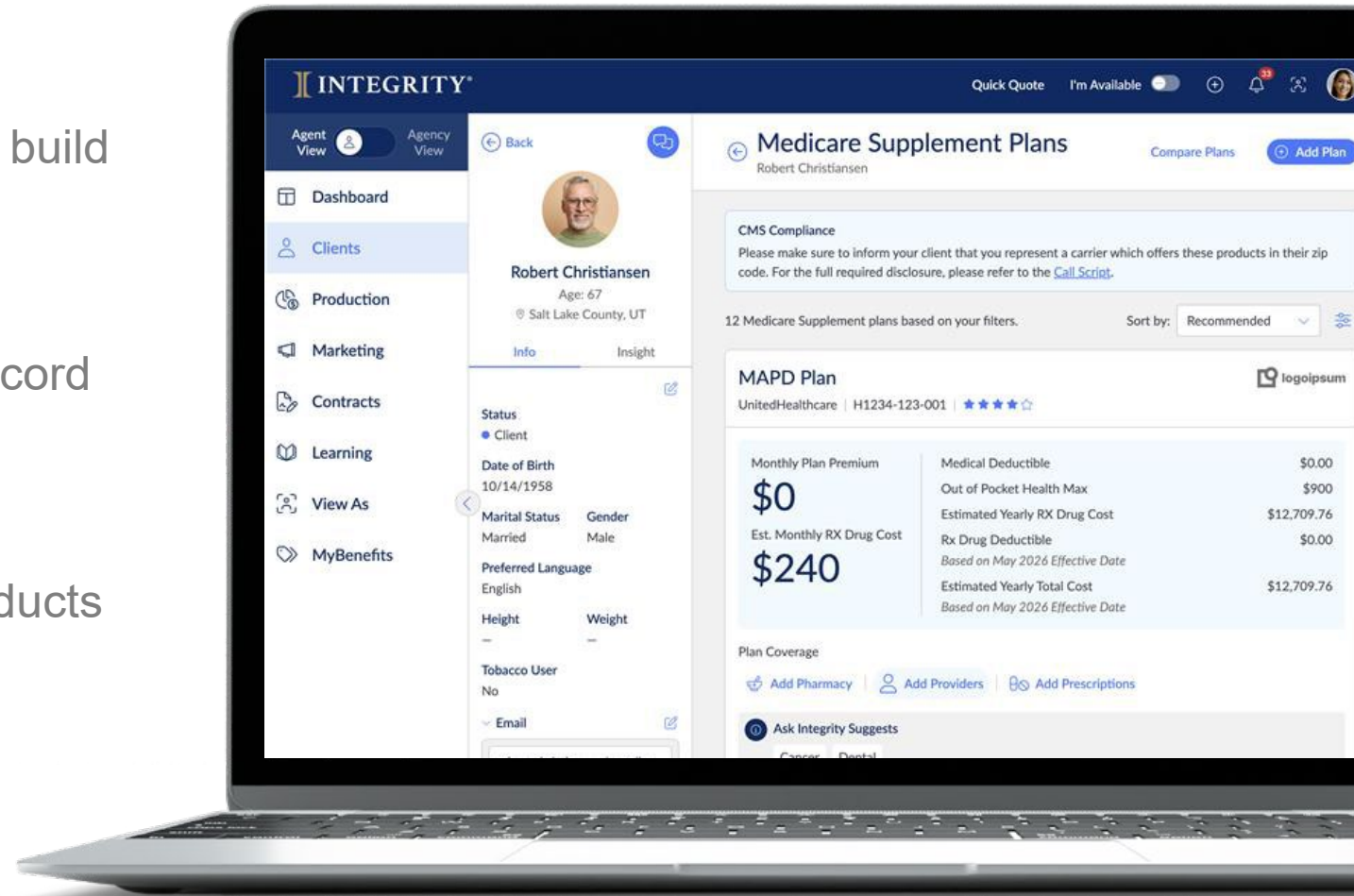
Ancillary integrated into quotes — agents build the best bundle.

MedSupp, Fully Integrated.

MedSupp quoting from the same client record — one workflow, all products.

Health, Centralized.

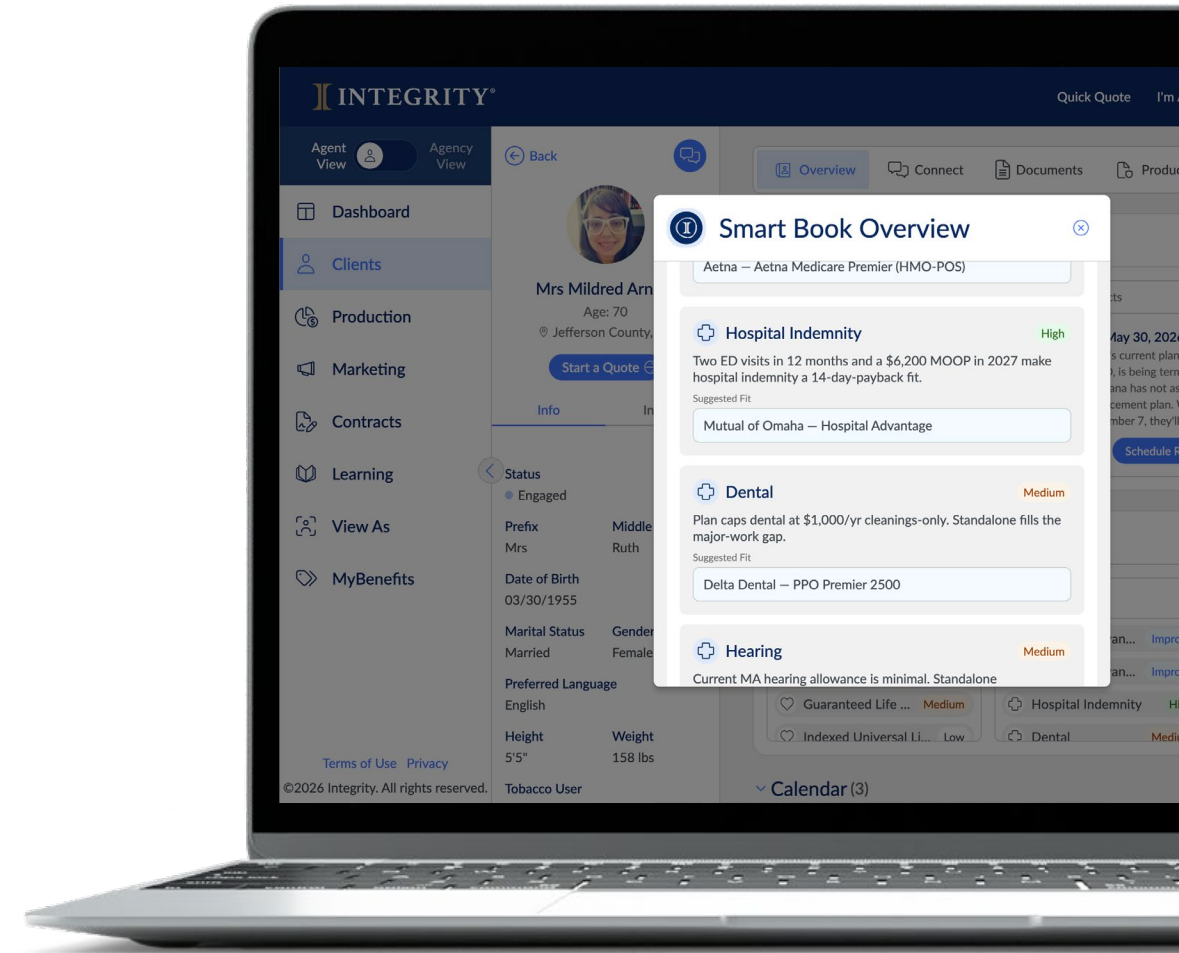
Expanding into ACA and other health products — a complete shopping experience.



Ask Integrity AI Smart Book

Stop guessing who to call. AI ranks **every opportunity by propensity to close** — across health, life, annuity, and supplemental. Powered by:

- Propensity-to-close models trained on conversion data across every line
- Client profile: demographics, current coverage, policy history
- Coverage gap analysis — what's missing and what fits
- Life event triggers: turning 65, employer coverage loss, spouse eligibility, new diagnoses
- Behavioral signals reveal readiness — before the client calls



In the future, IntegrityCONNECT will save agents' even more time

Ask Integrity AI Intelligence Elevated

Ask Integrity gets smarter — specialized for every agent workflow, everywhere.

AI Assistant.

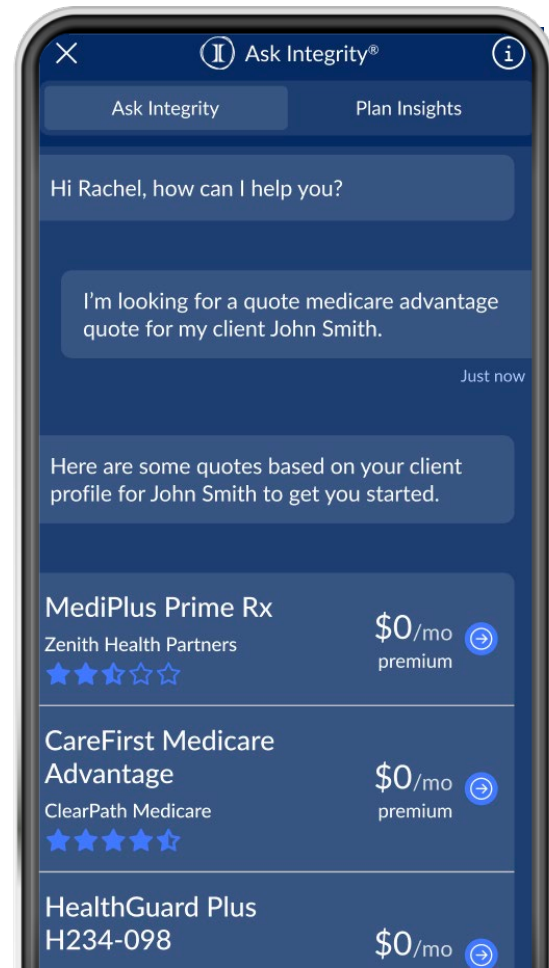
AI handles pre-meeting intake and books the appointment.

AI Coaches.

Personalized AI coaches for onboarding, demand-gen, and selling.

AI Talk-to-Quote.

Personalized client quotes — by voice, on the go.



IntegrityCONNECT Workshop

In-Person

August 5th
10AM - 2PM



Virtual

August 6th
12PM - 2PM





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