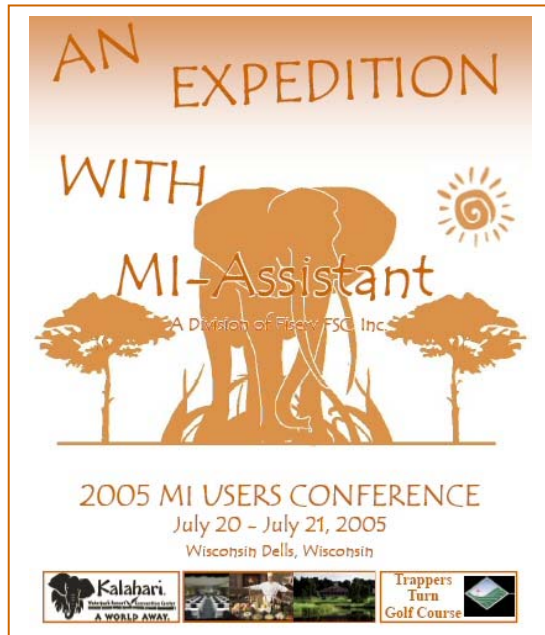




**MI-Assistant™**  
A Division of Fiserv FSC, Inc.

December 2004



Get ready for an outstanding expedition at the Kalahari Waterpark Resort & Convention Center and Trappers Turn Golf Course located in Wisconsin Dells, Wisconsin. We start the journey around daybreak on Wednesday, so pack your gear and grab your essentials for one of the most exciting, enriching, and educational opportunities for even the most experienced adventure enthusiast.

- Explore the parts of agent/carrier workflows
- Marvel at the awesome landscape of third party integration
- Unearth techniques to avoid the wooded thickets of using only carrier websites
- Venture into newest technology and electronic issues
- Meander through the terrain of obtaining and retaining your clients
- Ride through the muddy waters of trying to become more efficient
- Avoid the massive herds in your on-site domesticated accommodations
- Gather with fellow travelers for an extraordinary experience
- Discover what special guest carriers have in store for the independent agent
- Feast upon tasty vittles
- Trek across the route to a game of golf

Look to our website, special announcements, and monthly newsletters for additional details.

## Real-Time Messaging

*When important information isn't communicated in a reasonable amount of time, it generally creates confusion, misunderstanding and most often wastes valuable time.*

*For those reasons, MI Comparative Rater and MI Management System now display a Real-Time Messaging screen to communicate urgent messages, announcements and developments.*

## Are agents really using integrated report ordering with MI's rating program?

*Yes. From the inception of integrating reports into MI Comparative Rater, we have seen as few transactions as 10 per week. During the last year, independent agents have generated over 8,000 transactions per week with MI Comparative Rater.*

*Why is this so important?*

*It's very important to independent agents to quote multiple carriers for a client utilizing third party data without using specific carrier websites. To truly provide a variety of quotes for clients to choose from, it is necessary to obtain that data from one place, MI Comparative Rater.*

## Pekin Insurance Introduces Home Upload

*Agents writing home policies for Pekin Insurance in Iowa, Illinois, Indiana and Wisconsin are now able to directly upload application data from the rating program.*

# **MI Management System Training in March**

We're bringing it back! We've had an overwhelming request to bring back the MI Management System training courses that we offered in March and September. So here's our plan. We'll offer the same three levels of training in 2005 at our training center in Eleva, Wisconsin that we offered in 2004. Whether you're a new user, a current user that needs a refresher or more education, the training has been designed for anyone with the need or desire to use the MI Management System. Each level is designed to allow the user to get the most of the system.

## **Basic System Overview-Level 1 September 27, 2004**

Course Length: 1 Day | Course Cost: \$75  
Course Description: Troubleshooting/Answers to User questions, Basic System overview including: Clients, Applications/Forms, Locaters, Memos, Tranlogs, Imaging/Efiling, and Integration. Lunch provided.

## **Marketing & Policy Accounting-Level 2 September 28, 2004**

Course Length: 1 Day | Course Cost: \$75  
Course Description: Marketing, Reports, Tasks, Policy Accounting including: Direct Bill and Agency Bill. Lunch provided.

## **Accounting Integration-Level 3 September 29, 2004**

Course Length: 1 Day | Course Cost: \$75  
Course Description: Commission Reconciliation, Getting Started with Accounting including: Setting Beginning balances, Setting up QuickBooks Company, and Integration with QuickBooks. QuickBooks Overview including Check Writing, Deposits, Journal Entries, and Financial Statements are also covered. Lunch provided.

For more information on this upcoming training to be held at our training center in Eleva, Wisconsin, call 715.287.4262, logon to [www.mi-assistant.com](http://www.mi-assistant.com), or email [trainings@mi-assistant.com](mailto:trainings@mi-assistant.com).

# **Helpful Hints**

## **It costs ZERO to ADD carriers to MI Comparative Rater**

Monthly maintenance will not change on your monthly statement whether you add or delete carriers to your rating program. This is called the ALL COMPANIES billing feature.

MI-Assistant's ALL COMPANIES billing feature offers agents more flexibility and consistency in maintaining their account and budget for each monthly payment.

## **Monthly Billing Statement**

Monthly billing statements are sent on the 15<sup>th</sup> of every month prior to that month's service. Your bill is due on the first of every month.

## **Submitting timely monthly payments**

To ensure your account does not become delinquent, payments should be made by the 1<sup>st</sup> of each month. However, in the event MI-Assistant does not receive your payment the following will apply:

- 30 Days Delinquent** - Agency contacted
- 45 Days Delinquent** - Deactivation of software
- 60 Days Delinquent** - Collection agency

To check your account activity, visit: <http://support.mi-assistant.com>, select Support Center, then Account Summary.



Happy Holidays from MI-Assistant.