

# carrier tasks

ReSource Pro is exclusively dedicated to serving the insurance industry. We fully understand all facets of processing and operations, and our teams perform more than 3,500 individual tasks. This expertise allows us to develop custom solutions for each client.

Following are some sample tasks that we perform for carrier clients:

## Policy Handling Support

- Preparing insurance instructions
- Policy issuance/typing
- Policy accuracy/checking
- Electronic Policy delivery
- Process endorsements
- Invoicing
- Cancellation and reinstatement notices
- Follow-up for information

## Reporting & Special Projects

- Handling Surplus Lines Filings
- Systems integration/migration
- Conversion support
- Assist with book rolls
- Provide seasonal capacity
- Large schedule conversions
- Assist with marketing campaigns

## Underwriting Support

- Submission entry and clearance
- Renewal solicitation
- Indexing for document imaging
- Rating and coding
- Internet searches for support data
- Prepare loss summaries
- Develop quotes/proposals
- Issue loss runs
- Order and review MVRs
- Loss Control support (order, fact checking)
- Follow-up with agent for information

## Administrative/Accounting

- Running reports/spreadsheets
- Premium finance
- Scheduling agency review meetings
- Attaching emails to policy or agency files

*If you can define it....we can do it!*