

COMPLETE MORE **work**, MORE ACCURATELY.



MANAGE **relationships** ACROSS BUSINESS LINES.

Simplify back-office operations

Our software fully manages processing of annuities, mutual funds and securities, insurance sales, compliance, commissions, and electronic workflow. Broker-dealers, banks and insurance organizations can gain maximum competitive advantage with EAI's web-based, modular Platinum® system.

Our scalable, affordable and integrated back-office tools will make you more accurate. More timely. More efficient. And they can grow as you grow.

Better manage front-line sales

EAI's sales management tools help you meet retail-investments revenue goals. Our software delivers account aggregation, contact management and referral management solutions – plus comprehensive reporting to your front line.

Your clients' current value profiles are aggregated across all business lines. So you can access them anytime, from anywhere, and make better-informed decisions they'll appreciate.

Partner with us

EAI technology helps you achieve greater efficiency and profitability. Our reputation for being solid, honest and responsive has earned us industry respect. Since 1989 we've helped our client-partners grow and prosper. We call that experience.

Processing Modules

- Annuities
- Mutual Funds/Securities
- Insurance
- Compliance
- Commissions
- Electronic Workflow

Sales Modules

- Account Aggregation
- Contact Management
- Referral Management
- Management Reports

Contact Michael Standard, (503) 644-3057 ext. 223 or marketing@eaiinfosys.com

