

Problem

This life insurance company needed assistance with **state filings for three new voluntary products: hospital indemnity, critical illness and accident plans**. The organization also required help with a number of additional filing projects. Our client was seeking **consultants with SERFF experience**, along with either an individual or a group life insurance filing background.

Response

Jacobson provided six knowledgeable analysts to meet our client's requirements for this project. Due to the organization's set-up and our consultants' expertise, this project was **100 percent remote, including training**.

Solution

Our client shared positive feedback regarding Jacobson's subject matter experts as they **continually met and exceeded this company's goals**. Ultimately, the client elected to extend our consultants because of their demonstrated value.

As an added benefit, one of our consultants came to this project with **experience filing all three of our client's new products**. Because she was familiar with the text involved in these filings, she recognized improper provision wording that could have resulted in future litigation for our client. This litigation would have been challenging to win due to the incorrect wording in the draft form, and **our consultant helped our client avoid these legal mistakes**.

Legal/Compliance

State Filings Analysts

Client Type:

Life Insurance Organization

Project Scope:

New Voluntary Products

Duration:

1 Year 3 Months

Team Size:

6 Full-Time Analysts

JACOBSON