



THE RITTER PLATFORM

Elevate Your Sales Process

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RITTER PLATFORM OVERVIEW

The Platform is Ritter Insurance Marketing's proprietary agent dashboard for managing your business. It houses all of our industry-leading tools, making it easier for you to find and use the resources necessary for sales success.



Compliant Call Recording & Storing

Easily retain all phone conversations with Medicare prospects, clients, and leads.



Tailored & Efficient Plan Quoting

Run and compare accurate quotes using your clients' personal info.



Real-Time Client Record Management

Share in managing client profiles that contain prescription lists, providers, plan history, and more.



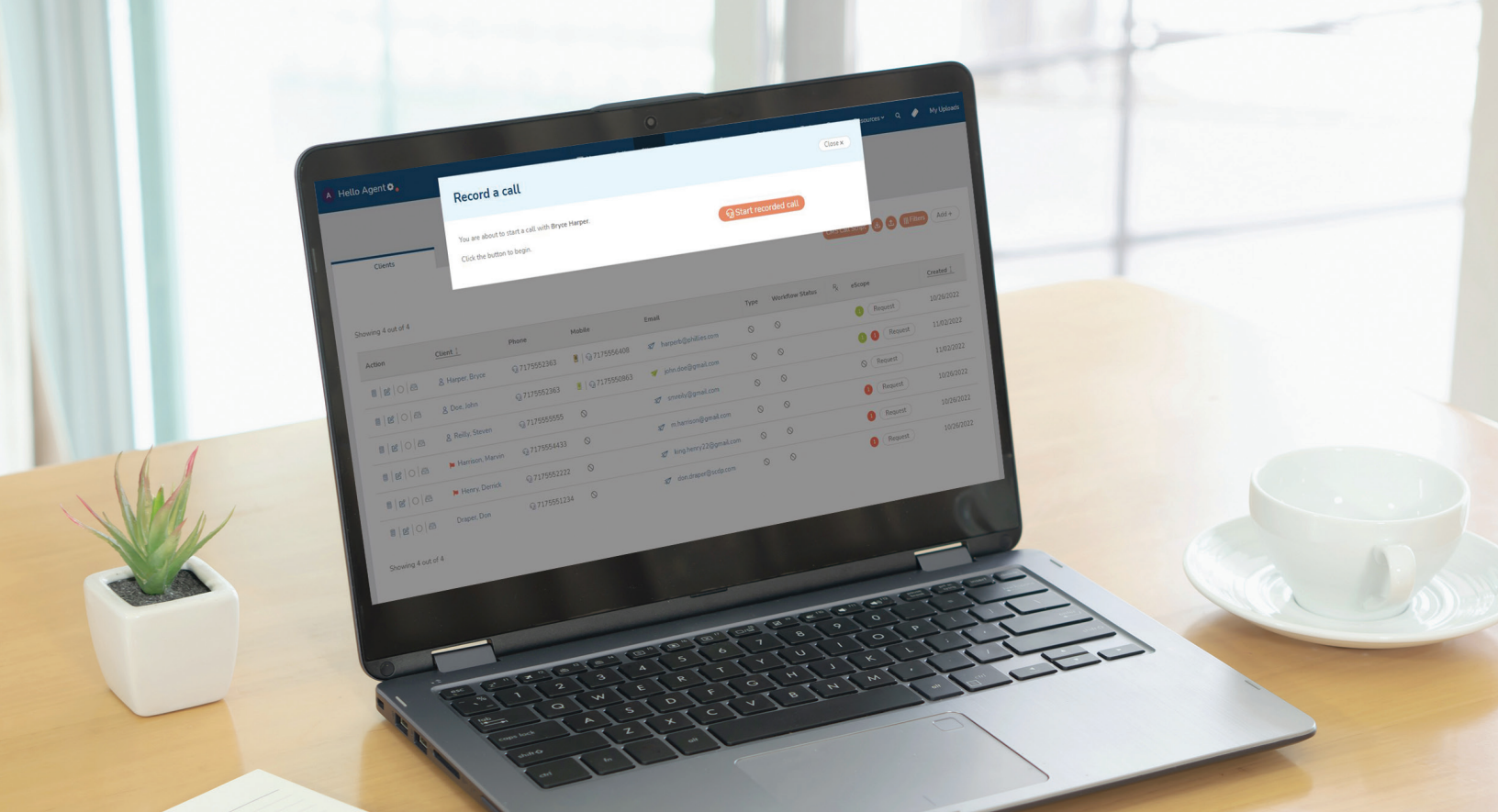
Innovative Shop & Enroll Integration

Works in tandem with our no-cost online enrollment tool, Shop & Enroll, creating the insurance industry's dream team.



A Ticket to Sales Anywhere

Seamlessly take a sale from start to finish by interacting either in-person or remote.



CALLVAULT

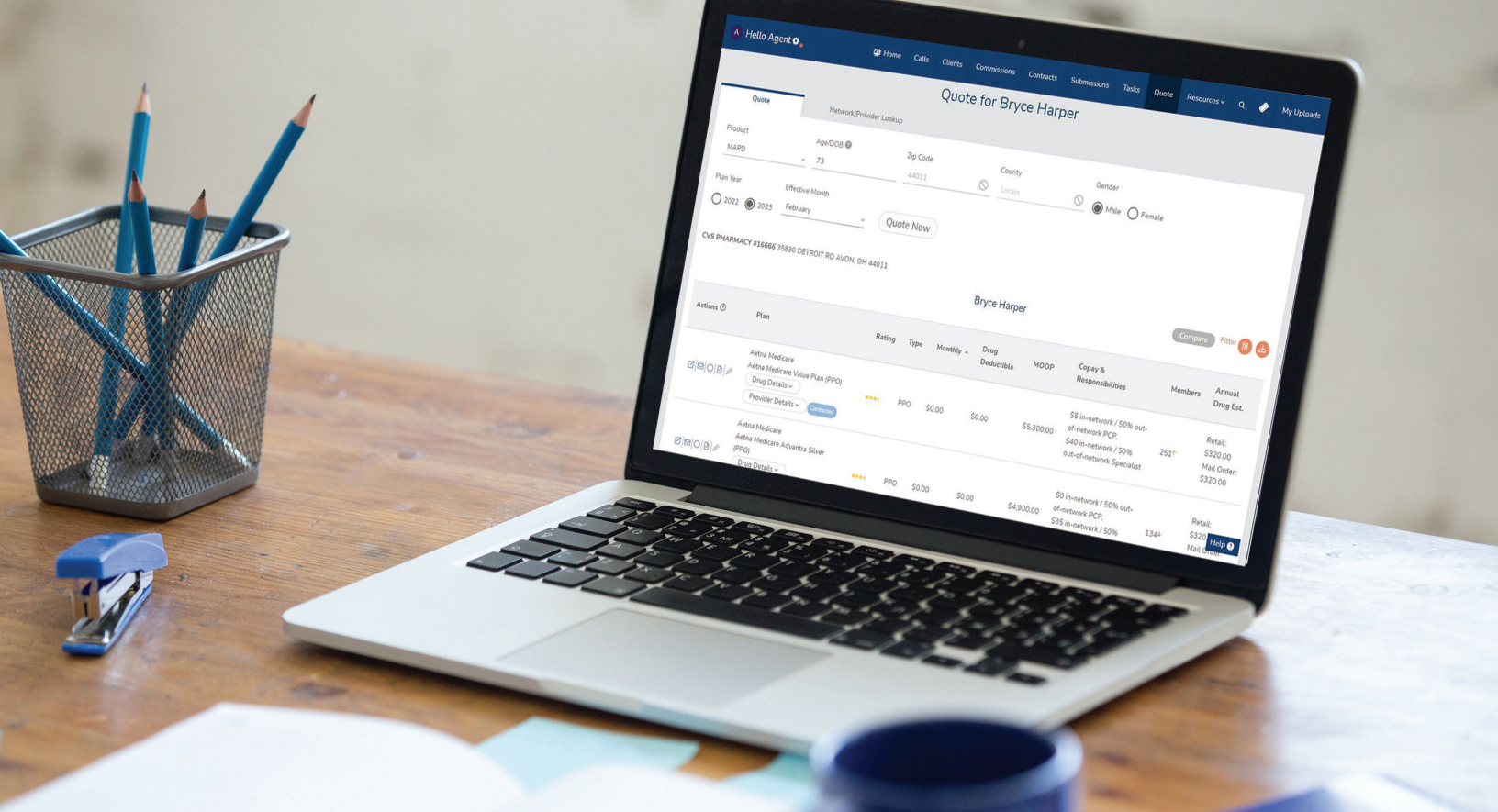
Keep phone communication with clients compliant.

Record and store outbound and inbound calls in order to adhere to the call recording requirement set by the Centers for Medicare & Medicaid Services.

CallVault enables you to:

- Start outbound recorded calls from the **Clients** tab
- Generate & forward your inbound phone number within your agent profile
- Quickly access call recordings from your clients' records
- Assign inbound recordings to a Shared Client Record from the **Calls** tab

**The CallVault compliant call recording feature is available today to all agents registered with RitterIM.com. For agents contracted and producing through Ritter, there is no cost to use this service.*



MEDICARE QUOTE ENGINE & DRUG COST ESTIMATOR

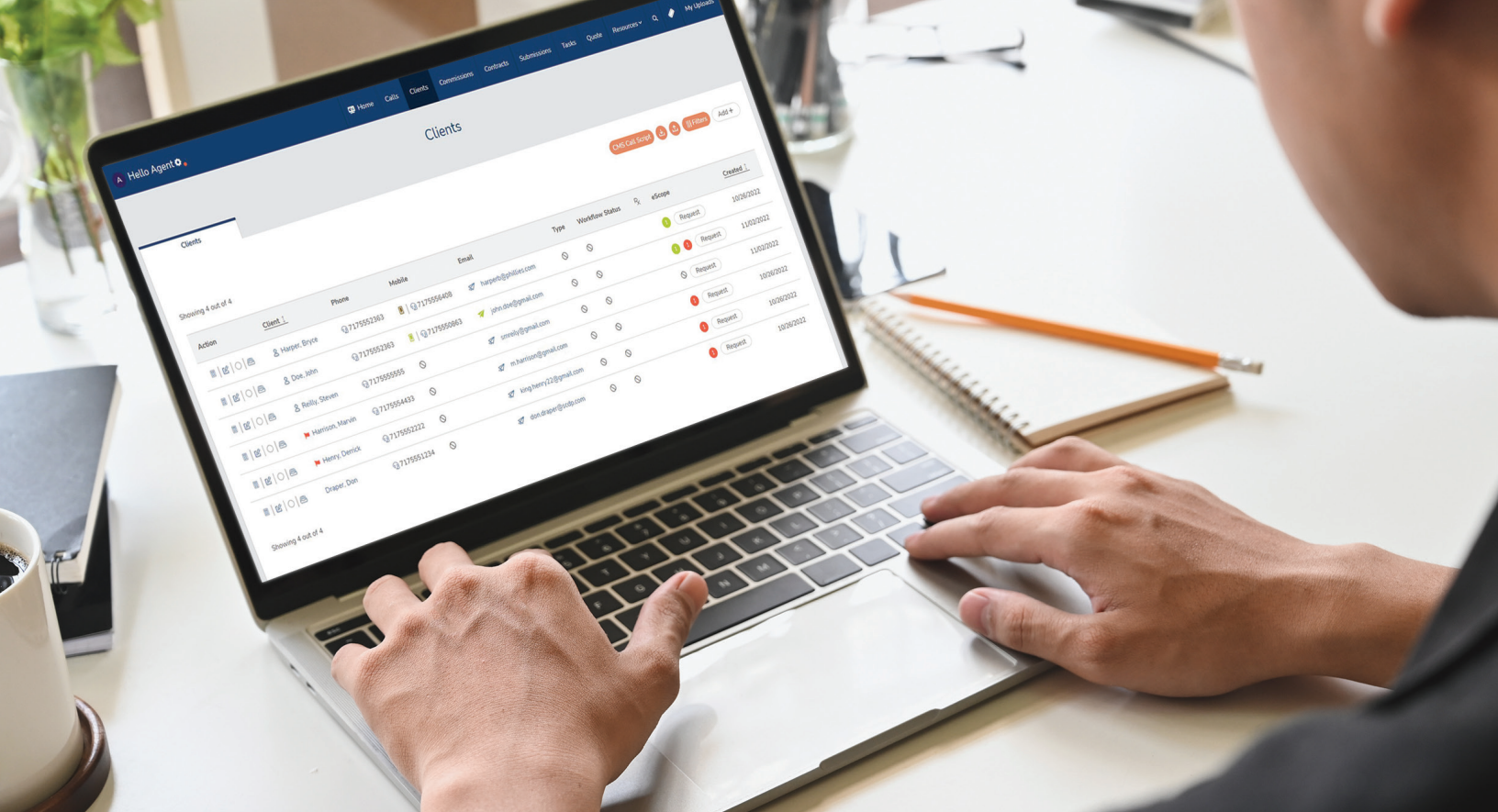
Show clients plan options specific to their needs.

Run estimates for Medicare and prescription drug plans using data in your Shared Client Records and reliable sources including the Centers for Medicare & Medicaid Services and CSG Actuarial.

With the MQE and Drug Cost Estimator:

- Filter results based on plan type and carrier
- Show plan ratings & any other associated costs
- Compare up to three like products side by side

Looking to run final expense and whole life quotes? Our quote tool does more than Medicare! Simply switch your product type and these quotes will display plan names, types, rates, and policy fees tailored for each client.



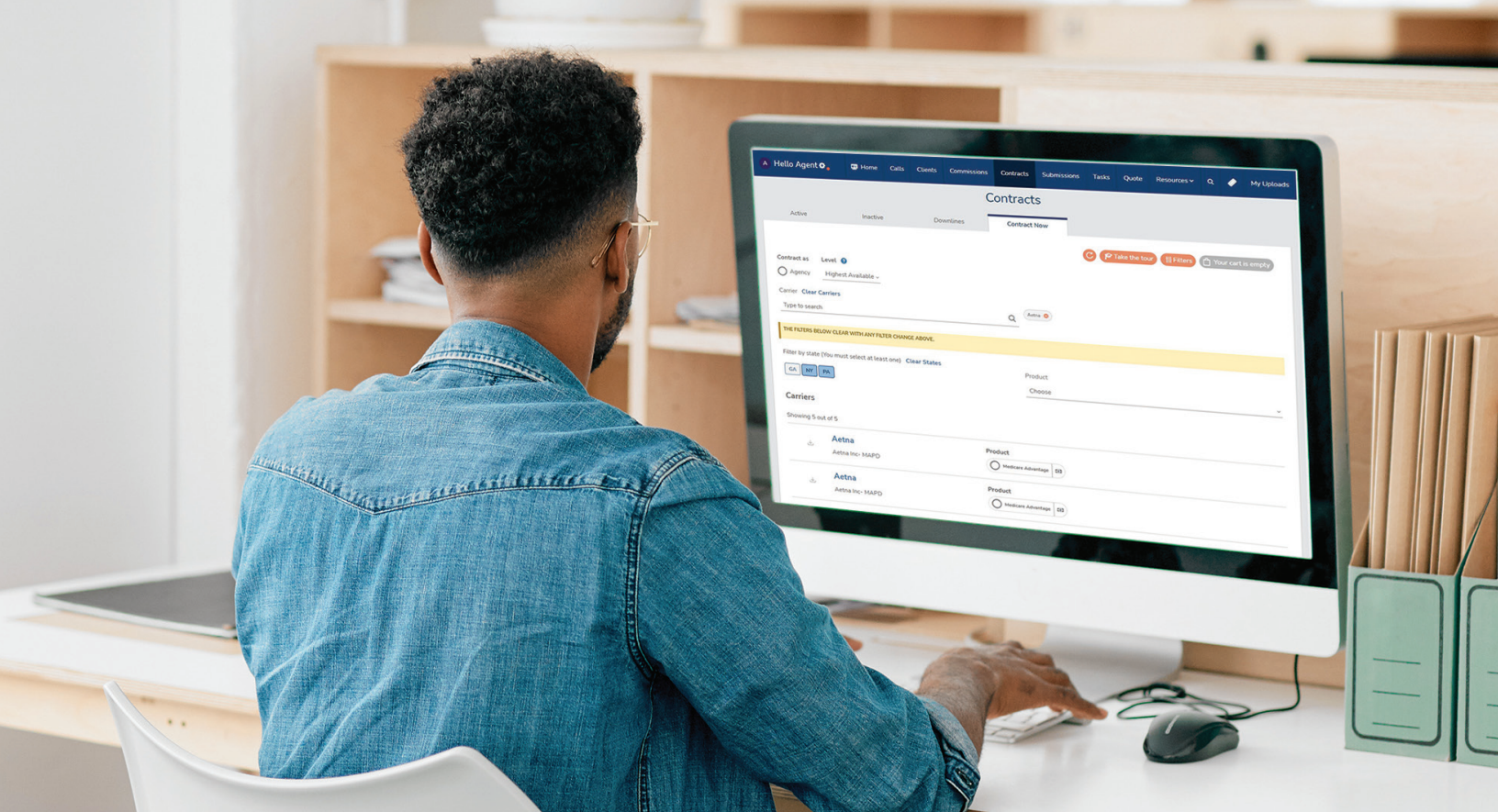
SHARED CLIENT RECORDS

Maintain a book of business and manage client relationships.

Invite clients to create their own Shop & Enroll account and share their prescription, provider, and plan information with you. These details are accessible under the **Clients** tab of the Platform.

Further manage your client list using capabilities such as:

- Uploading clients' contact & health info
- Separating leads from prospects
- Tracking products sold
- Adding notes to document personal facts or capture info



COMPREHENSIVE CONTRACTING

Develop carrier partnerships via a user-friendly, online contracting system.

Ritter offers contracting for more than 120 insurance carriers offering a wide range of products to ensure agents can build a diverse portfolio. Experience the ease of auto-fillable documents and digital submission of most contracts.

Our contracting system also provides:

- Fully online contracts
- Electronic “wet” signatures
- Quicker contract completion
- Streamlined insight of all contracting



COMPLETE BUSINESS MANAGEMENT

Gain unparalleled insight into your day-to-day activities and book of business.

Navigating to multiple resources to stay on top of your business operations is no longer required. In the Platform, click on the **Tasks**, **Commissions**, **Contracts**, and **Submissions** tabs to easily view and manage your schedule, commissions, partnerships, and enrollments.

Within these tools, you also experience:

- Insight into status of specific contracts and submissions
- Historical and searchable record access, securely stored
- Overview of portfolio and downline contract management

ADDITIONAL INTEGRATED FEATURES

Along with the powerful tools in the Platform, there are additional Ritter-exclusive features that heighten the user experience.



Shop & Enroll — Use Shared Client Records to generate quotes and prefilled Shop & Enroll applications, then send them to clients via email or text



Ritter Docs — Find reliable and up-to-date information and tutorials on our carriers, tools, sites, and programs



Agent News — Stay up to date on the latest industry news and tips by checking out the Ritter blog and Agent Survival Guide Podcast



Events — Register for Ritter and carrier-specific events like product training webinars and more

UNLOCK ACCESS TO THE RITTER PLATFORM

The Ritter Platform is exclusive to Ritter's partnered agents. Gain access by registering with our site!

Complete your free registration at
RitterIM.com/unlock

Have questions? Reach out at
RitterIM.com/contact.