



Why Choose Andesa

The Andesa Plan Administration System leverages modern software technology and decades of business acumen to meet the sophisticated recordkeeping requirements inherent to nonqualified deferred compensations plans.

- **Non-Qualified Plan Support**

Andesa supports a modern, nonqualified-focused technology platform with architecture to handle the complexity of a wide range of plan designs, including variable deferred compensation, defined benefit and split dollar plans. The administration platform was designed specifically to support nonqualified plans with input from top firms in the industry. Enhancements are continuously being made to the platform to stay relevant with ever-changing plan design and support needs.

- **Spectrum of Services**

Andesa offers a wide spectrum of services to best meet a broker's needs. The service offerings range from a Software-as-a-Service option (SSO) to a Full Service Option (FSO). In the SSO option, the broker utilizes the Plan Administration software to perform ongoing plan and policy support to their clients. In the FSO option, Andesa staff operates the software to perform the essential plan administration service functions, including plan calculations and report generation.

Testimonial

'Andesa is a firm that has a soul that is to say, it has incorporated into its operating procedures strong core values, which for us include: honesty, respect, integrity, responsibility, courage and initiative.' **Dr. John E Walker, Andesa founder**

To learn more, visit our website at andesaservices.com or call 610-821-8980

• Andesa's Compensation

Andesa offers an alternative to the commission-based model. A broker's commissions are not shared with Andesa. Instead, Andesa's variable fee-based model ties variable components within the broker's business to system usage and plan size. These components reflect the volume of business processed using the system. More importantly, these components reflect the growth of the broker's business, meaning Andesa grows only if the broker's business grows. In addition, the broker controls the level of client service provided by Andesa and retains primary and ongoing contact with their clients. All reports and web portals are broker-branded as well.

• Dedicated Support

For more than 33 years, Andesa has specialized in providing the highest possible level of support to clients. From an experienced client engagement staff to a highly engaged technical team, brokers will be able to get in touch with someone who can help overcome service challenges or work directly with a plan sponsor.

• Data Security is Important

Andesa maintains SSAE 16 SOC 1, Type II, and SSAE 16, SOC 2, Type I (unqualified opinion). In addition, Andesa maintains redundant datacenters and mature information protection programs, including data replication across two geographically-separated locations as well as daily, off-site encrypted backups.

About Andesa

Andesa began as a pioneer in the field of COLI/BOLI policy administration. Today more than 30 years later, Andesa provides comprehensive, integrated policy administration, plan administration and support solutions for life insurance and annuity carriers and producers. Partnered with numerous insurance companies (including 7 of the top 13 life and annuity carriers) along with several top distributors and producers, Andesa's integrated approach to insurance and plan administration results in efficiency gains, reduced hardware costs, mitigated compliance risk and improved market response. This comprehensive suite of services is offered in a secure, private cloud environment. The Company's highly-experienced team of U.S.-based professionals offers a true extension to a client's business, providing insurers and producers—large and small—with administrative support for complex product and plan offerings.