

For Underwriters and Brokers, new v7.8 Data and Tools  
Advisen.com's latest software v7.8 adds power for Underwriters and Brokers. New Company Type definitions have been added to best describe an insured's relationship with a parent company. SEC docs with links to As Reported Data are now standard. Interactive financials have been expanded, too. We now also track at least one key executive for almost 5 million companies. Catastrophes and Natural Disaster cases have been added to our online Large Loss database and we've made the output of charts and cases easier to obtain. The S&P Rating expansion package has also been added as a new premium service for D&O and Surety underwriters. Click here for more details as well as a link to our latest release notes.

Advisen's v7.8 went live on November 1. Whether you use Advisen.com for our underwriting templates, large loss research, or company research, you will find a noteworthy enhancement on the list below. Our v7.8 Release Notes together with screen shots are also online via [https://www.advisen.com/downloads/Advisen v7 8 Release Highlights Nov 09.pdf](https://www.advisen.com/downloads/Advisen_v7_8_Release_Highlights_Nov_09.pdf)

### **Corporate Action Research and New Company Type Definitions**

- Advisen does the legwork of analyzing and collecting information about corporate actions on a daily basis, including name changes, M&A, bankruptcies, IPO's, leveraged buy outs and delistings, to make sure that the demographics, company hierarchy, related exposures, and description of the transaction in the business description for all companies are accurate and captured in one easy to find location in Advisen (rather than spread across multiple sources, websites, or completely undisclosed sources).
- The addition of new Company Types to Advisen's company database paint a more accurate of a picture of company's status and relationship to its ultimate parent following a corporate action:

Underwriters & Brokers can use Prospecting to search for new business on companies who have undergone a certain type of corporate action such as Leveraged Buyouts (i.e. "Private (Formerly Public)" companies).

Searching for litigation under Litigation & Losses -> MSCAd Cases & Actions on an insured or potential insured becomes much easier when able to filter for certain company types like "Public Subsidiaries" as many named entities in class action are not the Public holding company.

Basic financial (sales, employees), people, and exposure data for private companies who were once publicly-traded “Private (Formerly Public)” companies is kept up to date and historical public financials are kept on the company’s profile to help insurance professionals easily understand changes in risk during the policy period.

### **SEC Document Tools & As Reported Financial Data in Advisen**

- Advisen’s SEC Full Filings tool provides a quick and efficient way for users to quickly find specific documents, navigate directly to key document sections, and export the entire filing to PDF or financial excerpts (as reported financial statements, notes to financials, and more) into a spreadsheet.
- For work-up users, Advisen can include direct links to various sections of key filings (10-K, 10-Q, 20-F and 8-K) in specified work-up sections, providing seamless access to key exposure information such as Financial Statements, Controls & Procedures, and Legal Proceedings. Users can click on these sections and simply analyze the information and enter their analysis or attach the contents of the filing section to their work-up.
- By making the sections available in proprietary underwriting Templates, SEC document sections are seamlessly incorporated into the underwriter’s workflow, providing additional time saving efficiencies, standardization for risk analysis across the firm, and a more comprehensive final work-up document to be used for internal meetings with management meetings and for auditing purposes. As reported and supplemental financial statement information, which is usually buried in varying sections of a given filing, can be easily downloaded for analysis and modeling.

### **Private Company People Data Expansion**

- There are now about 10 million total people available in Advisen People Master (people database). The number of companies in Advisen with at least one contact has grown from 228,000 to 4.95 million. Approximately three of every four US companies in Advisen now have at least one contact:
- Brokers & underwriters can use people & contact information as a data point in Advisen’s Prospecting tool to create a detailed sales opportunity lists. Using additional tools in Advisen such as Web References, Biographies, and Interlocks, Underwriters and Brokers can be better prepared for a first client meeting and can better understand if there are D&O exposures related to the company’s executives.

## **Interactive Financials Chart (Market Cap, Financial Statements, and Ratios)**

- The expanded financial content available in the Interactive Financials Chart allow users to visually identify trends in a company's risk due market cap changes as well as any major financial statement item or ratios. The graphical output can be downloaded to Word to be included in a presentation and the data behind the chart can be downloaded to Excel to feed a rating model.

## **MSCAd (Significant Cases & Actions) Enhancements & CATSCNd**

- Usability enhancements to make the MSCAd tool easier to use: Linking Company Name and Ultimate Parent Company Name to their respective Company Summary pages for seamless navigation to addition detail about the company, as well as the ability to export the top 25 cases in your search to a PDF file, and new features to save and access saved cases under My Advisen cases.

- Enhanced charting: Time Series Bar charts now include supplemental table numeric tables for more precise analysis; pie charts are now expanded to include all relevant categories of your search.

- Addition of new data: Catastrophes, Severe Calamities, and Natural Disasters (Advisen CATSCNd) in one of the most complete, accurate and useful databases of large catastrophe losses available, reflecting over 800 events which would each exceed \$100 million of economic damages in today's terms.

- Addition of new case data points such as Docket Source, Amount Affected for Casualty cases, to all cases where available.

## **S&P Ratings Expansion on Public & Private Companies [Premium Service]**

- Advisen has expanded its S&P Ratings coverage from the top 2,500 largest public companies to all companies rated by S&P (over 30,000), including Long-Term Credit Rating, Short-Term Credit Rating, Long-Term CreditWatch, Short-Term CreditWatch, Long-Term Outlook, Short-Term Outlook on all rating types such as Issuer Credit Ratings, Financial Strength Ratings, and more.

- S&P credit ratings allow underwriters, brokers, and risk managers to better understand the creditworthiness of an insured. Poor credit ratings are red flags for default risk on debt commitments, which is often tied to D&O Side A insurance claims. Brokers and Risk

managers can use the credit ratings to better understand the financial health of a carrier (or a reinsurer for underwriters). Poor issuer credit ratings or financial strength credit ratings can highlight the fact that the carrier or insurer may not be able to cover their claims.

- Advisen's ability to tie ratings to the company hierarchy provides a complete credit risk analysis for an entire company with a single mouse click, which provides a time saving efficiency and greater rating detail when compared to standalone ratings.
- Users can find new business by using Advisen Prospecting and searching for companies with certain rating types.

**NEED ASSISTANCE?**

Contact us and we will walk you through any aspect of Advisen.com functionality. Reach your Advisen rep at [support@advisen.com](mailto:support@advisen.com)