

Innovation through Knowledge



Auckland

Honolulu

Anchorage

San Francisco

Denver

Chicago

7:00 Boston

Rio de Janeiro

Montevideo

Reykjavik

12:00 Dublin

London

Paris

Athens

Dubai

Tashkent

Islamabad

Bangkok

Hong Kong

Tokyo

Brisbane

22:00 Melbourne

Sydney

Suva

FINEOS Corporate Overview



Established Leadership

FINEOS Corporation is a market leading provider of core software solutions for Insurance and Government Accident Compensation Insurance. Our flagship product, **FINEOS Claims**, is the insurance industry's best-in-class claims solutions for all Life, Disability, Property & Casualty and Government Accident Compensation Insurance.

FINEOS has built an enviable track record of highly successful implementations which deliver tangible business benefits. Our strength is in our people; our ambition; our knowledge and experience; and our focus on higher levels of excellence in every aspect of work and life.

Established in 1993, the company delivers innovative solutions to a global market and has customers, employees and established bases in North America, Europe, Africa and the Asia Pacific markets.

Financial Strength and Growth

FINEOS has consistently delivered year over year profitable growth since inception. Our successful performance has been achieved through our clear business vision and strategy. Our ability to anticipate and adapt to changing economic environments and business models, combined with our focus on people, innovation, customer service and delivery, is the foundation of our success.

FINEOS has been honoured with a host of industry excellence awards and accolades that bear testament to our drive for success and achievement.

Global Successful Customers

FINEOS customers are strong references for our flexible, user-oriented business solutions which deliver tremendous value and significant return on investment. We work with many of the world's innovative thought leaders in both private and public sector insurance and insurance related organisations.

FINEOS delivers measurable business benefits, ensuring customers recoup the investment made in our products and services. Through partnership and collaboration, FINEOS works to quickly establish a shared vision of how our solutions will address our customers' needs. Our focus is always on understanding and satisfying our customers' business objectives and through meaningful and regular communication, we co-construct the optimum solutions to fit the specific business needs. We share our ideas, aspirations and knowledge of industry best practices to maximise outcomes.

Core to our Success is our People

Underpinning the FINEOS success story is the dedication and creativity of our people, who are industry and technology solutions experts. This dedication is strengthened with a unique collaborative culture and a commitment to a set of values known as the '**FINEOS Core**'.

The **FINEOS Core** is our shared set of values in support of our vision of corporate and personal success. In other words, our people see their success very much tied to the success of FINEOS.

FINEOS people have a positive outlook and continuously seek possibilities to discover, innovate and improve. We are a company which is both a great place to work and a great company to do business with. Our work environment is one of positive, meaningful communication where everyone can make a contribution and help to improve our performance. We share an environment dedicated to finding the best outcome and achieving excellent results.

People development and knowledge retention are regularly assessed and measured within FINEOS. Our employee satisfaction surveys and retention levels are among the highest in our industry. We select people who we connect with and we continuously strive for high levels of employee development, growth, realisation and satisfaction.

Management, Board & Governance

FINEOS has an experienced executive leadership team with considerable knowledge of software development and deployment within the global Insurance and Government Social Insurance industries.

Our company has an international Board of Directors with valuable experience and knowledge of our business and our major international markets. The board members are located in different geographical regions giving us a regional and global view of our customers' needs.



Michael Kelly
Founder and CEO

Ward Graffam

Chair; former President of UNUM European Holding Company, Chairman of UNUM UK and Senior Vice President of UNUM America. Ward also served as COO of Team USA in the America's Cup

Tom Wall

CFO; former CFO for Oracle (Ireland) and Finance Director for Oracle (EMEA)

Peter Le Beau

Managing Director, Le Beau Visage; former Head of Underwriting and Marketing at Swiss Re (UK) and founder of the Protection Task Force

Philip Small

Director of Pillar Administration; former President of CSC's Financial Services Group in Asia Pacific

Seán Dorgan

Chairman of Ulster Bank Group and non-executive director of FBD Holdings and Short Brothers plc; former Chief Executive of the Irish Development Authority

FINEOS - At a Glance

- FINEOS is the only claims solution successfully implemented globally across Life & Health, Property & Casualty (General Insurance) and Government Compensation Insurance.
- FINEOS has experienced year over year profitable growth since inception
- FINEOS supports claims processing at four out of the top eleven group Life & Disability insurers in the USA
- FINEOS supports 100% of all Injury and Illness Claims in New Zealand
- FINEOS supports over 30% of the General Claims market in Ireland
- FINEOS supports 30% of Government Injury and Illness Claims in Australia



Innovative Business Solutions

FINEOS continually invests in research and development to ensure our leadership as a world-class core software solutions provider within the global insurance industry. We provide a set of highly effective commercial off-the-shelf core solutions, known collectively as the **FINEOS Insurance Suite**, which focuses on solving real business issues and delivering true and lasting benefits.

Our flagship product, **FINEOS Claims** is a customer-centric, web-based, universal claims software solution for all Life, Disability, P&C and Government Insurance. **FINEOS Claims** is supported by **FINEOS Payments**, our powerful, comprehensive scheduling and flexible payments product for automating one-off, recurring and complex reimbursement transactions.

FINEOS Claims is a complete lifecycle claims solution which excels in enabling complex claims management. With its case management capabilities, claims handlers are guided through the multi-dimensional process of dealing with all parties related to the claim. FINEOS Claims informs and alerts claims supervisors and senior executives by providing vital claim operating information through real-time dashboards and regular information reports. In other words, it ensures every related party to the claim receives the best possible outcome.



Modern Technology Platform

Designed and developed by FINEOS and written in Java (JEE), the **FINEOS Insurance Platform** is the backbone of our technology and applications suite upon which all of our business solutions are based. The **FINEOS Insurance Platform** guarantees scalability, interoperability, flexibility, reuse and rapid application deployment. With these capabilities, FINEOS customers have a competitive edge in terms of speed to market, reliability and the security of a future proofed, modern solution.

Agile and Configurable

The **FINEOS Configuration Studio**, delivered as part of every FINEOS software product solution, enables business users to exercise a high degree of control and flexibility over the operation and workings of all elements of FINEOS. Business users can enable system change and configuration in line with their needs without having to depend on technical development resources for system change. The **FINEOS Configuration Studio** continually evolves, incorporating many advances to empower users to drive their own work agenda.

Leading Industry Standards

FINEOS solutions enable our customers to outperform their competitors. The **FINEOS Insurance Suite** keeps pace with the advancing, ever-changing world of Information Technology and insurance industry standards. It conforms to globally acknowledged ACORD insurance standards.



The **FINEOS Insurance Platform** is IBM SOA approved. In addition, FINEOS is the only software platform in the world to conform to IBM's Insurance Process Acceleration Framework (IPAF) and IBM's Government Industry Framework. This positions FINEOS as the best-in-class provider of business process and case management solutions within global Insurance and Government Social Insurance industries. This CRM and business process expertise provides a robust foundation for FINEOS Claims capabilities.

Industry Product Partners

FINEOS works with a focused group of innovative, complementary partners who have established leadership in their own fields of expertise. Through tight integration and close collaboration with our partner community, FINEOS delivers a more complete business solution to our customers. FINEOS partners include IBM and Deloitte and many niche insurance product and service providers such as Reed Group, Wolters Kluwer, Crowe Paradis, Claim Analytics, Adaptik and Advactor Group.

User Configuration

FINEOS Configuration Studio

Business Solutions Layer

FINEOS Insurance Suite

Applications & Technology Layer

FINEOS Insurance Platform



Dublin



Boston



Melbourne

Delivering Customer Value

The FINEOS Global Services Team uses the **FINEOS Implementation Methodology** for successful project management and software deployment. The **FINEOS Implementation Methodology** is a proven discipline based on our own experience and best practice management standards such as the Prince2 industry standard methodology.

FINEOS can act as the implementation prime or play a supporting role to our customers or third-party partners. The key to success is to ensure a partnership based on open communications, shared understanding and a collaborative delivery model where everyone on the team focuses on the business case in the most effective manner possible.

Our FINEOS Global Training Services team delivers a full schedule of FINEOS training courses (standard or tailored for specific customer needs) and supporting documentation for every aspect of the FINEOS solution.

Successful Customer Implementations

With deep knowledge and experience in insurance, FINEOS understands that every customer is different and requires variations in approach to implementation. We, therefore, engage as early as possible in the formation of the business case and implementation project to understand the detail and to develop the right approach to working with our customers to achieve their business objectives.

FINEOS has a track record of rapid implementations of our core solutions. Examples of these successes include the implementation of **FINEOS Claims** achieved within three months at **Macquarie (Life) Insurance** in Australia and within five months at **Thomas Cook Travel Insurance** (White Horse) in Europe.

Often our customers have diverse lines of business, multi-step and third-party hand-off processes, with multiple integrations and legacy systems which require conversion to the FINEOS platform. For these larger, more multi-dimensional projects, FINEOS has an excellent history of successfully planning, designing and implementing within budget and on time.

One of many examples of a successful highly complicated claims implementation is the Bodily Injury and Compulsory Third Party Injury claims project at the **Transport Accident Commission (TAC)** in Victoria, Australia where FINEOS replaced 19 different systems in a single implementation phase on time and within budget. Another example of success would be the implementation of **FINEOS Claims** for Disability at the **Internationale Nederlanden Groep (ING)** in the US where the project was completed in nine months.

Outstanding, highly responsive customer support is a key element of the FINEOS business model. Our FINEOS Global Support Team provides support services on-site and off-site through help desk, web portals, documentation, user groups and customer account management.



Business Benefits Achieved with FINEOS

Handled same claims volumes with 5% fewer staff

Life & Disability Insurer, NA

Reduced overall claims admin costs by 15%

General Insurer, Europe

Delivering over AUS \$250 million in actuarial reserve release

Government Agency, AsiaPac

Reduced claims expenses by €3 million in first year of operation

Multi Line Insurer, Europe

A History of Awards & Achievements

2011 Celent Model Carrier

- FINEOS implementation at TAC

Insurance Canada.ca Technology Awards

- FINEOS - Honorable Mention - P&C Technology Provider - Claims

- Manitoba Public Insurance - Winner - P&C Insurer - Claims

IASA Technology Innovation Awards

- Manitoba Public Insurance - Honorable Mention - Personal Injury Protection Plan (PIPP) Transformation Initiative

2010 Liberty Syndicates

- FINEOS' First London Market Customer

2009 Celent Model Carrier

- FINEOS Implementation at Assurant

2008 ICT Excellence Awards

- IT Company of the Year

Celent Model Carrier

- FINEOS Implementation at ACC

2007 FINEOS Claims Global Summit

- First Gathering of Claims Customers in Chicago

2006 FINEOS North America Capability Centre

- Opens in Boston

2005 FINEOS AsiaPac Capability Centre

- Opens in Melbourne

2004 Irish Exporters Association

- Exporter of the Year

Irish Software Association

- Sales and Marketing Innovation Award

2002 Assurant

- FINEOS' First North America Customer

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