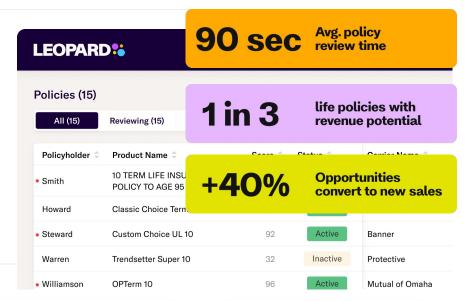# LEOPARD

Overview

Built for life and annuities distributors, Leopard is an AI-driven platform that lets you structure and **mine your existing book of business for revenue opportunities**. Instead of manually collecting and reviewing client and coverage data, Leopard works in the background and automatically surfaces up-sell, cross-sell, and replacement opportunities, so you can grow your business and strengthen client relationships.

LEOPARD

Policies (15)

All (15)   Reviewing (15)

Policyholder	Product Name	Score	Status	Carrier Name
• Smith	10 TERM LIFE INSU... POLICY TO AGE 95			
Howard	Classic Choice Term			
• Steward	Custom Choice UL 10	92	Active	Banner
Warren	Trendsetter Super 10	32	Inactive	Protective
• Williamson	OPTerm 10	96	Active	Mutual of Omaha

90 sec — Avg. policy review time

1 in 3 — life policies with revenue potential

+40% — Opportunities convert to new sales

Key benefits

Discover new revenue opportunities

Mine your book of business to find sales opportunities you would've missed.

Save time by automating policy reviews

Avoid manual policy reviews, and let Leopard take care of everything automatically.

Improve client relationships

Automated, at-scale reviews give you a reason to reach out to every client, showing clients you have their best interests in mind.

How it works

1

Retrieve policy data

Connect directly to carrier portals or upload policy data into Leopard, and Leopard's AI will extract key attributes needed for policy evaluation.

2

Leopard's AI evaluates your book of business

Leopard analyzes your book, runs quotes for alternative options, and highlights your best revenue opportunities.

3

Reach out to target clients

Pursue replacement, conversion, and up-sell opportunities with the help of AI-generated talking points.

Interested?

Visit **www.theleopard.com** or email **info@theleopard.com** for more information.

Opportunities detected

→ **Term replacements**

Help clients extend their coverage, save money, or increase their death benefit.

→ **Conversions**

Stay on top of opportunities to convert term policies to permanent coverage before conversion windows close.

→ **1035 exchanges**

Quickly understand when policies are out of surrender and exchange lower value policies for higher-value ones.

→ **Lapse prevention**

Find out which policyholders are at high risk of lapsing so you can proactively engage them.

→ **Coverage gap upsells**

Determine which clients are well suited for increased coverage.

→ **Custom query**

Work with the Leopard team to detect unique opportunities that meet your needs.

Data protection

Leopard is committed to keeping all client data entered into the platform confidential and strictly protected. We are SOC-II compliant and have special agreements with AI vendors to ensure no entered into Leopard is retained by AI providers or used to train their models.

About Leopard

Legacy systems and fragmented data have long bogged down life and annuities distribution and management. Leopard was built to change that. Our platform empowers distributors, financial institutions, and carriers with seamless access to in-force policy data, AI-driven opportunity detection, and powerful tools that turn information into revenue. Founded in 2023, Leopard is headquartered in New York, New York and backed by D.E. Shaw.

Interested?

Visit **www.theleopard.com** or email **info@theleopard.com** for more information.