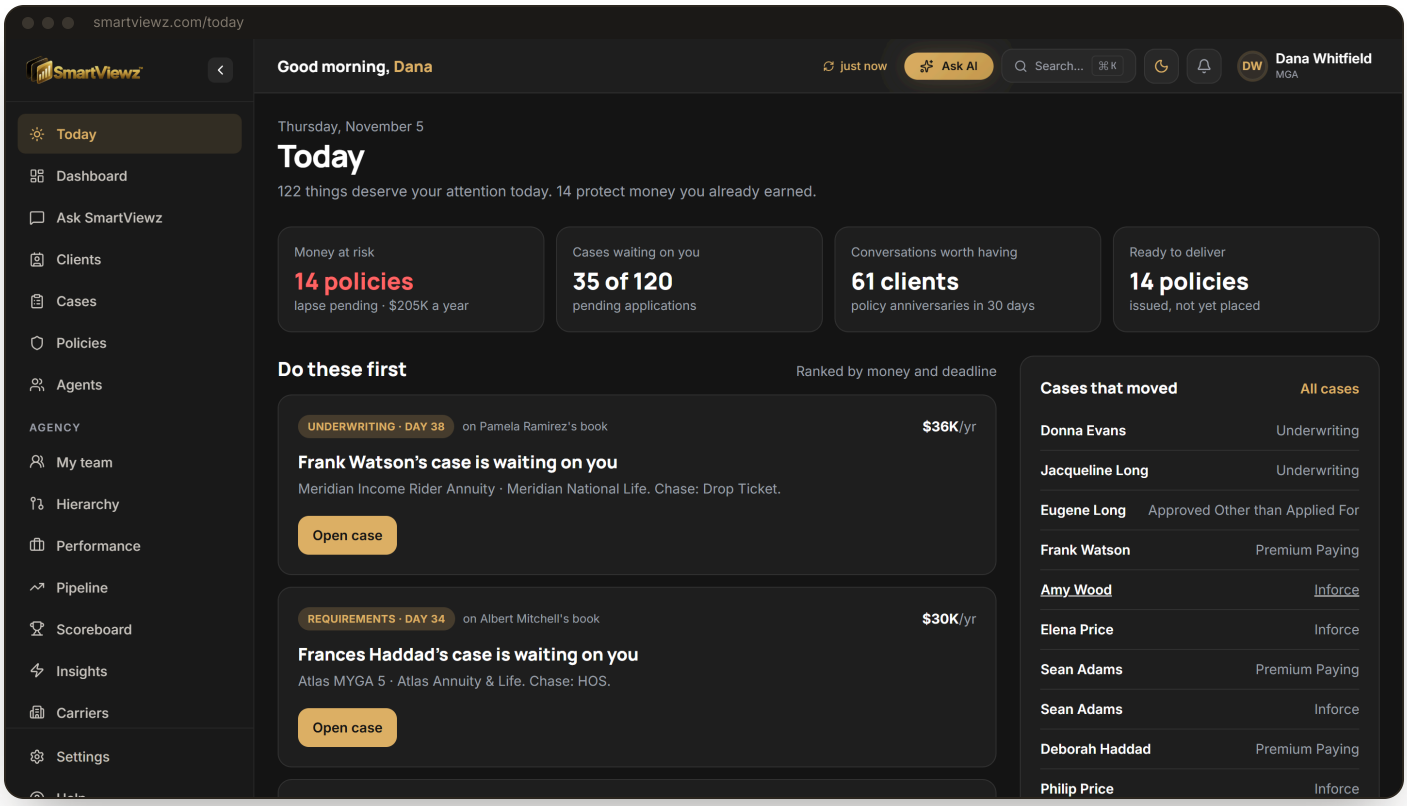
01 · FOR AGENTS · TODAY

Know who to call before your coffee's cold.

Today reads your Smart Office book overnight and ranks what needs you by money and deadline: policies about to lapse, cases waiting on you, and clients worth a call.

MONEY AT RISK	WAITING ON YOU	WORTH A CALL	RANKED BY
14 policies	**35 of 120**	**61 clients**	**Money + deadline**
$205K a year, lapse pending	pending applications	anniversaries in 30 days	biggest first



$ Lapses to save

Each lapse-pending policy with its premium and carrier. A call before it lapses usually saves it.

→ Cases waiting on you

The applications stuck on your move, with what's missing, one click from the case.

☎ Conversations worth having

Policy anniversaries coming up: the easiest reviews and referrals of the month.

Screens and figures: Harborline Financial demo office (sample data).

Start every day with the list that pays.

See it on a real sample agency, then set it up on your own book in one call.

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