

## FSI TECHNOLOGY

Multistate insurers have been subject to increasingly complex and standardized directives since 1871 with the development of uniform financial reporting by insurance companies. Since then, new legislation, new levels of data collection and delivery, and the automation of annual financial statements have led to the need for Financial Software Innovations, Inc.'s (FSI) expertise.

Financial Software Innovations, Inc. (FSI) has been the innovative leader in automated financial statement for insurers since its inception. Founded and staffed by seasoned industry veterans, the FSI team has significant experience and a proven track record. Ongoing R&D investment allows FSI to lead the industry in annual statement software efficiency.



The FSIOasis main screen gives you direct access to many common filing tasks you can complete with the click of a button.



Our "Data Map" feature is used to bring in your custom data and reduce keying. You can map all reporting periods and state filing reports.

## Optimized Annual Statement Insurance Software

In the development of the FSIOasis Annual Statement System, the FSI R&D team conducted focus groups to design the Annual Statement system for an accountant's perspective and financial manager's needs. We found ways to pre-populate cells and automate the creation of statement pages to reduce your workload. The validations and calculations update continuously as you enter data to immediately notify you of any errors.

## FSIOasis at a Glance

FSIOasis transforms the filing process through its intuitive navigation and helpful wizards that guide you effortlessly through each step. Screen views in FSIOasis are designed to resemble the printed page, and the system uses many familiar Windows application features. Our easy-to-use crosschecks run quickly and take you directly to the error in question.

## KEY FEATURES

- Main screen displays pages, current period, current company and the latest date each file has been saved.
- Prior Year Transfer runs in one step for any filing.
- Create custom PDFs of any or all pages from the main screen or using the Print Utility.
- Data controls and instant data tests to reduce data entry errors.
- Custom Data Mapping tool to allow the importing of data from virtually any source file – set up one time and refresh data at any point.
- Context-sensitive help to provide guidance with the task a user is currently working on.
- Verify Wizard – Links directly to pages, so by double-clicking any error reference you can jump to the page and see the issue.
- NAIC Filing Wizard – Walks through the filing process with just a few easy steps.
- Multi-company batch jobs allow processes such as verify, PDF creation, printing, data importing or NAIC file creation to be processed for multiple companies at the same time.
- Scheduled tasks – schedule tasks (such as backing up files) to run daily or on a custom schedule.
- Pre-populated and customizable state specific forms.

# FSIOASIS



optimized annual statement insurance software



Pre-populated and customizable state specific forms.

# FSIOASIS



optimized annual statement  
insurance software

## SYSTEM REQUIREMENTS

### | CLIENT MACHINE REQUIREMENTS |

Each user accessing FSIOasis will need the client installed on their workstation.  
Windows XP or higher.

### | APPLICATION SERVER REQUIREMENTS |

Server installation required for multiple users to access the application at one time.

### | DATABASE |

FSIOasis stores data files in XML format and each user is required to have Read/Write/List access to the FSIOasis Installation Folder.

Download and use our quarterly software to file for FREE. The quarterly version of FSIOasis is available for download at [www.fsioasis.com/oasis](http://www.fsioasis.com/oasis). A single install is used for all lines of business. You can file for FREE for all quarters and if required, monthly filings as well.

"FSI has been great to work with. The software specialists are always available when we need them and are always accommodating in customizing features for us."

Lindsey Pendergast  
Senior Accountant  
Liberty Mutual Insurance

"I've been a customer of FSI's for over 20 years. The software has always been very user friendly, and gets better and better every year. I don't know what I would do without you guys."

Jan Wilson  
Vice President – Statutory Reporting  
Fidelity National Financial

"FSI Oasis software is extremely intuitive, elegant and easy to use for both end users as well as system administrators. Because of the way in which data is stored in the system we have been able to successfully design and implement other systems to use the Oasis data files to facilitate other types of reporting requirements"

Doug Furlong  
CPA, CTP  
John Hancock Financial

### Included with Purchase

- Unlimited toll free Technical Support
- Installation and Implementation
- Initial customized training and ongoing training as needed

## FOR A PRODUCT DEMONSTRATION

CALL OR EMAIL US TODAY!

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FINANCIAL SOFTWARE INNOVATIONS, INC.



a world of solutions

## ABOUT FINANCIAL SOFTWARE INNOVATIONS, INC.

Financial Software Innovations, Inc. is a privately held company focused on helping customers meet the challenges of today's demanding accounting practices by delivering the industry's most efficient and innovative annual statement and unclaimed property systems available.

FSI was founded in 1985 and is headquartered in Austin, Texas.

Staffed with seasoned industry veterans, we have extensive experience and a proven track record.

Ongoing research and development allows us to lead the industry in annual statement and unclaimed property software efficiency, providing an exclusive advantage to our clients.