AdviceOS Insurance Comparison

Compare features and pricing of insurance products in real time with the powerful AdviceOS Insurance Comparison module.

Midwinter offers two insurance comparison data source options:

- Omnium
- Chant West

Both tools analyse the differences between policies and calculate the premiums to help advisers rationalise costs versus features.

Insurance Comparison integrates directly with the CRM and Fact Find to populate client details, and with the Needs Analysis tool to generate recommendations and an SoA.

	Chant West	Omnium
Insurance comparisons	✓	✓
Insurance recommendations	✓	✓
Insurance research	✓	✓
Policy type comparison (Retail vs Group)	✕	✓
Premium validation	✕	✓
Premium transfer	✕	✓
Policy score	✓	✓
Visual policy score	✓	✓
Feature versus premium matrix	✕	✓
Compare multiple alternatives	✕	✓
Adjustable scoring weight	✕	✓
Search by benefits	✓	✕
Projection charts	✓	✓
Advanced projection charts	✕	✓

Insurance Comparison is available as part of the Insurance Module in AdviceOS.