Innovation Championship by ZURICH — GOLD

THE EFMA-ACCENTURE INNOVATION IN INSURANCE AWARDS — SILVER

PLUG AND PLAY — VOTED #1

MC MASSCHALLENGE 2020 FINTECH — FINALIST

Recover more. Faster.

Empower the next-gen claims professional

VIEW DEMO

37% ⌃ Potential increase in unattempted files

21% ⌃ Potential increase in dollar net recovery

90% ⌄ Reduce human effort

33% ⌄ Decrease contingency fees

3,000 👍 Statutory rules curated & monitored

15M 👍 Notes processed for natural language

safekeep

"Safekeep is a game-changer.
We can greatly **increase recovery**
without adding head count."

Head of Claims, National P&C Carrier

ZURICH

ROOT

**Over 8 Carrier
Design Partners**

Duck Creek

servicenow

NASP

GUIDEWIRE

salesforce

ACORD

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FinTech Innovation Lab
ALUMNUS

Lloyd's Lab
ALUMNUS

Our Leaders

Jeff To

CEO

- Former Global Head of Insurance, **Salesforce**; a $500M ARR business
- Two-time ACORD "Top 10 Leader"; **IBM** Innovator Award
- Board Member, Maguire Academy of Risk Management & Insurance, SJU
- Board Member, **Hagerty**
- MS in Engineering, Penn Engineering, UPENN
- Lean Six Sigma Blackbelt, Agile PMP, Certified Management Accountant

Tom Korach, MD

Chief Data Scientist

- Postdoctoral Research Fellow, Brigham & Women's Hospital, **Harvard Medical School**
- ETL, OCR, cleaning, classification, info extraction of scanned litigation documents, and productized the ML pipeline
- Clinical Director, **Allscripts dbMotion** – Population Health Management Solutions
- Tel Aviv University, Doctor of Medicine

Andrew Panagotopulos

Head of Claims Innovation

- 16 years as a claims leader across various business lines at **Liberty Mutual**
- Increased recoveries from $48.03M in 2018 to $57.47M in 2019 a 20% increase
- Led 4 teams comprised of 30-45 employees during the centralization of commercial subrogation
- MBA, Bentley University; Associate in Risk Management, The Institutes

Kit Trentin

Recovery Manager

- 15 years in claims; 7 years in subrogation
- **Sedgwick**, Farm Bureau, National Subrogation Services
- Commercial P&C across all lines including works comp, auto, property, general liability
- Trained and managed teams of subro analysts
- Bachelors, Upper Iowa University

Gabriel Weiss

Chief Customer Officer

- Head of customer success, pilot programs, and strategic partnerships
- Formerly a senior member of the **Russell Reynold**'s global Technology Sector and Fintech/Insurtech and Data & Analytics Practices
- Captain & Airborne Ranger, US Army
- BA, International Studies, University of Mississippi; Advanced Proficiency in Mandarin, International Immersion, Donghua University

Kevin DeGarmo

Chief Claims Officer

- Director of Subrogation & Salvage, **Allianz**
- Board Member and Former President of **NASP**
- Director - Subrogation, Salvage and SIU, **Fireman's Fund**
- CPCU and Certified Subrogation Recovery Professional
- BA, University of Missouri-Columbia

Hassan Arbabi

Data Scientist

- Post-doc research at **MIT** and **Johns Hopkins**
- Data-driven methods for dynamical systems
- Applied mathematics and computational sciences
- Affinity toward problems of climate & healthcare
- PhD, Mechanical Engineering, **UC Santa Barbara**

David Cheung

Technical Architect

- Director, Financial Services, Center of Excellence, **Capgemini**
- Innovation Lead, Liquid Studio, **Accenture**
- Senior Technical Architect, CloudSherpas (acquired by Accenture)
- Technical Architect, ADP
- Bachelor of Commerce, Management Information Systems, Concordia University

Valerio Zhang

Head of Engineering

- Product Development Tech Lead, **MDLand**
- Big data, InfoSec & infrastructure, Microservices
- AWS Cloud Practitioner
- Certified Professional Coder, AAPC
- BSc, Computer Science, McGill University

Jorge Pagan

Recovery Manager

- Over 18 years at **The Hartford** as a Subrogation Specialist, Investigative Specialist, and Senior Claims Analyst
- Executed investigations, determined cause and origin, identified, established and pursued viable recovery opportunities
- Conducted benefit claim investigations, utilizing research tools to support / rule out potential fraud based on facts

How it works

Our digital subro platform

safekeep

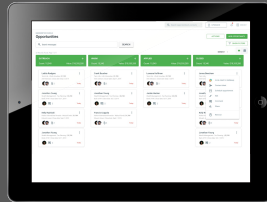# Trigger recovery anywhere in the journey

1 Intake
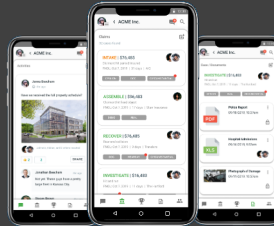- Is the claim eligible?
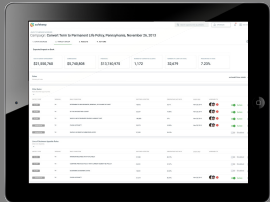
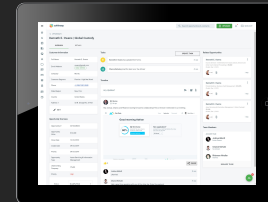**2 Triage**
- Who owns this task?

3 Investigate
- What's the damage?

4 Settle
- What's the loss amount?

5 Recover
- Is there recovery potential?

Proven value

How we're different

1

INCREASE RECOVERY
Sort claims by subro score to work on claims with the highest potential.

2

FASTER RESOLUTION
Early detection prioritizes your work queue according to business and regulatory factors.

3

DATA ENRICHMENT
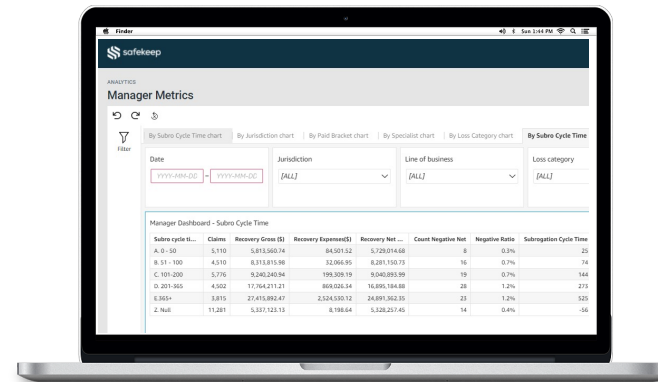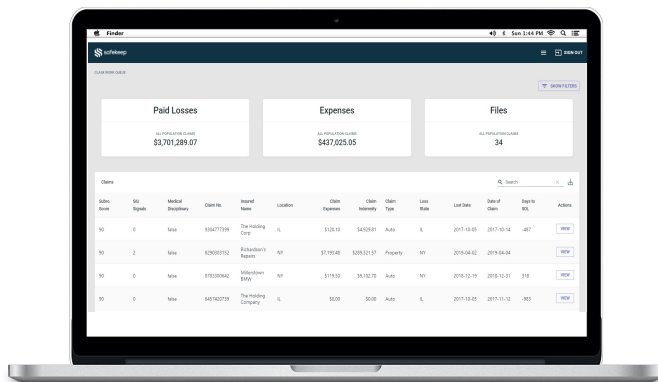Internal/external data & over 4,000 regulatory rules reveal patterns in related claims that drive action

4

RAPID INTEGRATION
Safekeep is pre-integrated with Duck Creek and Guidewire

5

MEETS DATA SECURITY & PRIVACY REQUIREMENTS OF GLOBAL CARRIERS
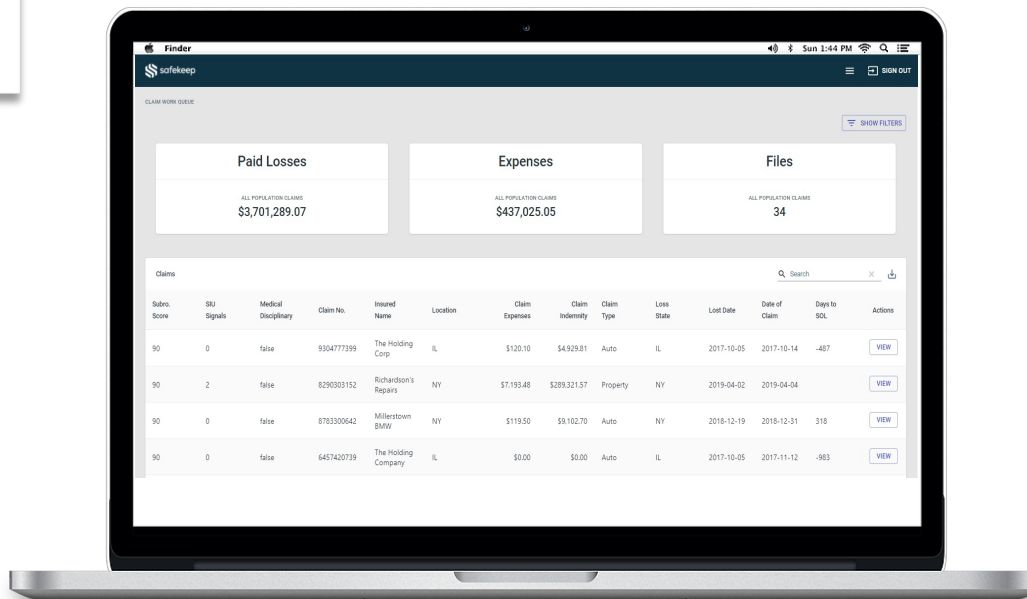Safekeep has completed all SOC2 Type 2 requirements | Bank-grade security | Single tenancy deployment & protective moat around carrier data

Find missed opportunities

1

SUBRO SCORE
Sort claims by subro score to work on the claims with the highest potential.

2

MANAGE DIARIES
Safekeep automatically prioritizes your work queue according to business and regulatory factors.
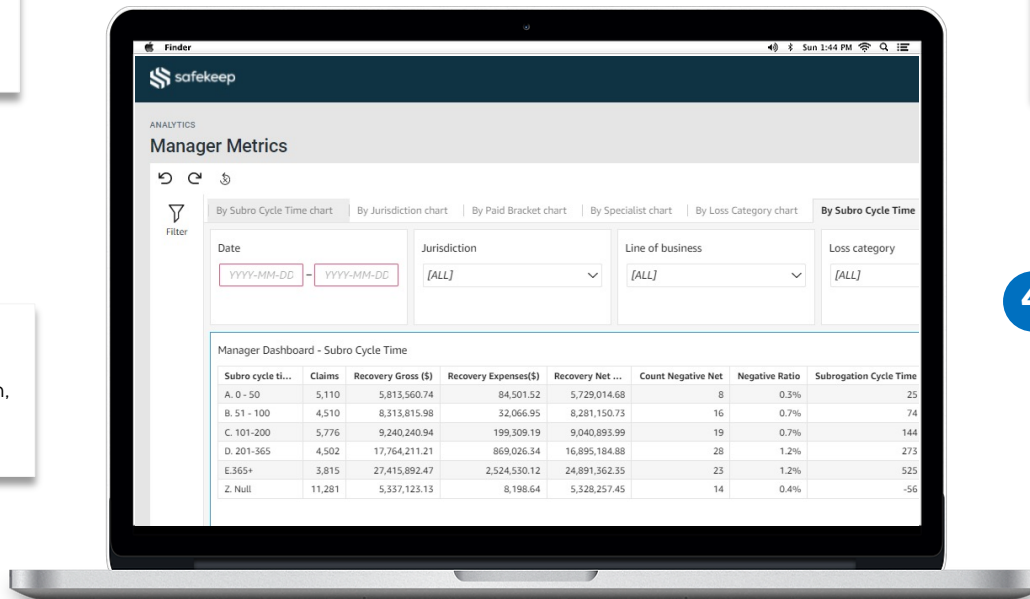
Track net recoveries

1

REAL-TIME
Real-time view into your pipeline

2

FIND PATTERNS
Find patterns by jurisdiction, LOB, processor, loss, etc.

3

COACH TEAM MEMBERS
See productivity at the team member level and provide coaching for improvement

4

CONFIGURE
Configure your dashboard to see the data that matters to you

ANALYTICS
Manager Metrics

| By Subro Cycle Time chart | By Jurisdiction chart | By Paid Bracket chart | By Specialist chart | By Loss Category chart | By Subro Cycle Time |

Filter

Date
YYYY-MM-DD — YYYY-MM-DD

Jurisdiction
[ALL]

Line of business
[ALL]

Loss category
[ALL]

Manager Dashboard - Subro Cycle Time

Subro cycle ti...	Claims	Recovery Gross ($)	Recovery Expenses($)	Recovery Net ...	Count Negative Net	Negative Ratio	Subrogation Cycle Time
A. 0 - 50	5,110	5,813,560.74	84,501.52	5,729,014.68	8	0.3%	25
B. 51 - 100	4,510	8,313,815.98	32,066.95	8,281,150.73	16	0.7%	74
C. 101-200	5,776	9,240,240.94	199,309.19	9,040,893.99	19	0.7%	144
D. 201-365	4,502	17,764,211.21	869,026.34	16,895,184.88	28	1.2%	273
E.365+	3,815	27,415,892.47	2,524,530.12	24,891,362.35	23	1.2%	525
Z. Null	11,281	5,337,123.13	8,198.64	5,328,257.45	14	0.4%	-56

Resolve duplicate records

1 Unstructured Data
Fragmented view of insureds, claimants, submissions

ibutes to her compounding job duties that she
ge a recurrence if she drives for Lyft. The
b evaluate her, confirm diag... **Insured** ...nfirm

I placed a call to the Lyft HR admin and tol
paid for her time **Insured** xplained again
Content l opinion as to whether her i
doctor's report.

ask wh **Diary** ing to know whether she will
ation in 14 days of receiving the Lyft claim and
nake a decision on the claim **Insured** of th

2 Duplicate Records
Multiple records of "John Smith" or "Lyft"

Insured ID	Insured Name	Address
9873453934	Lyft Corp	441 9th Ave
4534545436	Lyft.com	441 Ninth Ave
6976524354	Lyft Inc.	441 9th Avenue
45543879835	Lyft	742 Market St

Identify liability

Search using conversational queries

"chainsaw broke apart and hit employee"
"thermal printers that caused fires"
"employee fell when ladder broke"
"asbestos cases resulting in long term disability"

Search   I'm Feeling Lucky

Search for **patterns**

Which claims have **recovery potential**?

Which entities are related to a **loss type**?

Which **adverse carriers** are the most litigious?

Which **injuries** are driving the highest severity?

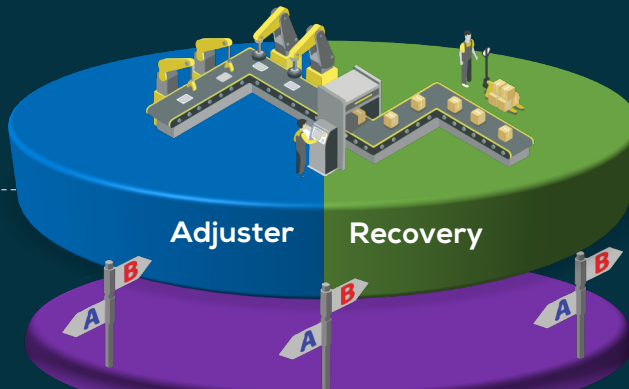Which **job classes** drive the highest volume?

Which **manufacturers** are related to a given loss type?

Which **medical providers** bill the most for a given injury?

Search   I'm Feeling Lucky

We fit into your environment

Workflow & Dashboards
Collaborative workflow for intake, demand, diaries, audit, coaching
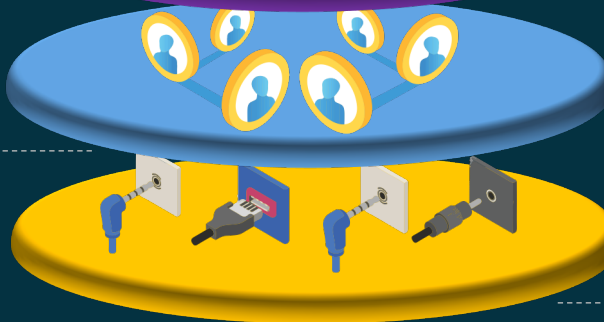
Predictive Models & Rules
Identify recovery potential in "unattempted" claims across lines

Natural Language Processing
Identify recovery-relevant entities in claim notes and third-party data
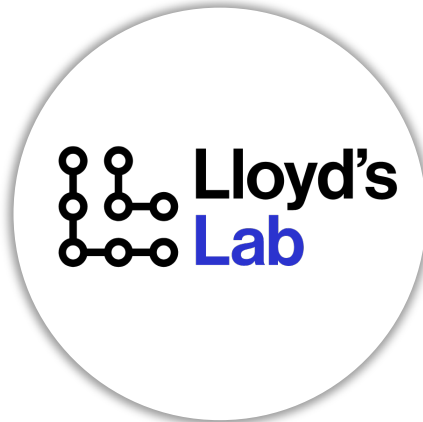
Integration or Batch Feed
Immediately connect your back office to AI-guided workflows

Existing Back Office

GUIDEWIRE

Duck Creek

Blockchain

3rd Party Data

Contact info@safekeep.com

Jeff To

Safekeep

Chief Executive Officer

LinkedIn:
https://www.linkedin.com/in/jeffto/

- Founder and CEO of Safekeep, a Global Gold Winner in the Zurich Innovation Championship, Global Silver Winner of the Efma-Accenture Innovation in Insurance Award, Voted #1 by Plug and Play Insurtech's corporate partners, and was selected by insurers as an innovation partner in the Fintech Innovation Lab, MassChallenge, and Lloyd's Lab.

- Safekeep uses machine learning and natural language processing to automate decisions and regulatory rules in insurance.

- As Global Head of Insurance at Salesforce, Jeff built a team that discovered and brought B2B2C solutions to market through co-design partnerships, and rapidly scaled up Salesforce's insurance revenue and market penetration globally. He founded Fintech Garage as a new way to mobilize thought leaders from financial institutions, startups, and venture capital, and was twice named by ACORD as a "Top 10 InsurTech Leader".

- At IBM, he was a nominated member of IBM's business and technology leadership program which assigned the most complex challenges to its rising leaders. Jeff brought Smarter Cities, Smarter Healthcare, and Retail solutions to market, winning anchor customers for "first of a kind" solutions, earned his way into IBM's 100 Percent Club, and was recognized with the Innovator Award.

- He is a board member at Hagerty and the Maguire Academy of Insurance and Risk Management at Saint Joseph's University.

- Jeff holds an MS in Engineering from the University of Pennsylvania, a bachelors from the Rotman School of Management at the University of Toronto, and is a Certified Lean Six Sigma Black Belt, Certified Management Accountant, and Agile-Certified Project Management Professional.

www.safekeep.com