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Simplisure Expands Digital Life Insurance Advisor Capabilities

Advisors gain enhanced ability to quickly determine the appropriate level of coverage for any client's unique situation

Simplisure is life insurance simplified®.

WELLESLEY, MA, UNITED STATES, May 29, 2025 /EINPresswire.com/ -- Today Simplisure announced a major expansion of its digital life insurance advisor capabilities, providing financial advisors and their clients with the ability to quickly and easily determine the appropriate level of coverage for each client's unique situation. Simplisure's advisor dashboard also now has a new look and feel, and features a new educational resources tab, providing advisors with a complete set of tools to support their clients.

> "Being able to help advisors and their clients determine how much coverage they need is the latest step in our ongoing endeavor to build out a fully functioning digital life insurance partner."
>
> *Caleb Baker, CLU®, Simplisure co-founder*

The CFP Board identified life insurance as a key element in its "Guide to the 7-Step Financial Planning Process" report. However, life insurance tends to be the least-implemented recommendation in a client's financial plan, often because the client doesn't know how much coverage they need and many advisors are unsure where to turn for a good analysis.

Simplisure's Needs Analysis functionality was built using decades of real-world life insurance needs data and recommends the appropriate level of coverage and length of term. Using the client's information, including mortgage, debt, savings, income, childcare, and education expenses, it provides real-time, dynamic analysis and recommendations, based on a combination of industry standards and advisor experience. It produces a detailed, full-page report with a breakdown of the calculation and a final recommendation that advisors can send to their clients. The feature seamlessly integrates into Simplisure's quoting process, which instantly compares pricing across high-quality insurance carriers, allowing a client and their trusted advisor to determine a need, review the potential options and initiate the application in the same session.

“These updates continue our mission of simplifying life insurance and empowering advisors to better inform and care for their clients,” said Brack Baker, CFP®, CLU®, ChFC®, Simplisure co-founder. “I found over the years of working with clients and advisors that many didn’t have this type of detail and clear, reportable analysis. Our goal was to make clear to clients exactly what they need and why they need it. For many advisors and clients that I worked with, not having a clear analysis could sometimes be a barrier to getting a life insurance policy in place, which is often the missing piece of a good long-term financial plan.”

Simplisure is a digital life insurance partner that allows financial advisors to easily obtain coverage for their clients, guiding them through the process and remaining connected with them into the future. It does not require an advisor to be a life insurance expert or have any life insurance licensing.

The advisor dashboard’s updated interface makes streamlining and organizing clients’ life insurance even more straightforward and accessible than ever before. Simplisure’s comprehensive education library is now fully integrated with the dashboard, enabling users to gather useful context along the way, so clients can make the most informed decision possible. Advisors can easily navigate through a set of tabs as they enter information, gather policy recommendations and quotes, stay informed as their client goes through underwriting, and then have an organized place for their clients’ policies in the future, all in a single interface.

“Being able to help advisors and their clients determine how much coverage they need is the latest step in our ongoing endeavor to build out a fully functioning digital life insurance partner,” said Caleb Baker, CLU®, Simplisure co-founder. “It walks an advisor through the same process we would, based on our collective decades partnering with advisors and working with clients. We want to empower advisors to meet their clients’ needs by addressing the life insurance gap that often exists within their financial plans and to provide those clients’ families with long-term security by making sure this critical part of the plan gets implemented and maintained.”

The new recommendation tool, education library and advisor dashboard are all included in each of Simplisure’s three subscription tiers, which include the following:

- Advisor Basic: Allows users to run unlimited quotes, includes detailed reporting tools, and provides collaborator access, which allows clients to add a spouse or CFO to help complete the application.
- Advisor Expert: Provides access to industry experts and to Simplisure’s proprietary knowledge base; allows advisors to organize and manage client policies not purchased through Simplisure, and to run scenarios based on specific health conditions; provides access to future automated analytics and AI-assisted agent.
- Premium Enterprise Service: Provides a complete white label solution and customized

integration into an existing tech stack.

Additional information on the updated advisor dashboard is available in [this video.]

About Simplisure
Established in 2018, Simplisure is a digital advisor for term life insurance, enabling advisors and their clients to research, compare, purchase, and maintain their policies online. The company was founded by a group of veterans of the life insurance industry with a vision to address significant technological gaps and make things less confusing for consumers. Simplisure uses proprietary, AI-driven tools and a streamlined platform to take life insurance into the digital age, delivering the best protection at the right price. Simplisure is life insurance simplified®. To learn more, please visit Simplisure.com.

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