

Eventual Treasury and Leavitt Group Partner to Explore AI-Driven Automation in Back-Office Workflows

Eventual Treasury and Leavitt Group enter into a strategic partnership, modernizing revenue operations and back-office processes through AI-driven automation.

SAN FRANCISCO, CA, UNITED STATES, July 29, 2025 /EINPresswire.com/ -- [Eventual Treasury](#), the leader in production-ready AI for insurance accounting, and [Leavitt Group](#), one of the largest privately held insurance brokerages in the nation, have entered into a strategic partnership to modernize revenue operations and back-office processes through AI-driven automation.



Together, the two companies are working to bring clarity and control to traditionally manual, time-intensive workflows such as direct bill accounting and carrier document processing. While still in the early stages of implementation, the collaboration signals a bold step toward transforming legacy operations with cutting-edge automation.

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*Mohit Chawla, CEO of
Eventual Treasury*

“We are proud to be launching and innovating with a partner as trusted as Leavitt Group,” said Mohit Chawla, CEO of Eventual Treasury. “We believe AI has the power to simplify the most complex parts of insurance accounting, and this partnership allows us to design with real operational insights in mind.”

Eventual Treasury’s intelligent automation platform is designed to streamline financial workflows, eliminate human error, and reduce reliance on outdated or outsourced processes. For organizations like Leavitt Group, this kind of innovation holds the promise of greater

accuracy, faster turnaround times, and cleaner, more actionable financial data.

Key capabilities of the platform include:

- Automated Direct Bill Accounting: Intelligent matching of commission statements and real-time reconciliation.
- Smart Carrier Downloads: Zero-touch document processing from multiple carriers, mapped to agency management systems workflows.
- Enhanced Data Accuracy: Built-in quality checks to minimize revenue leakage and support financial integrity.
- Operational Streamlining: Tools designed to eventually reduce manual input and free up internal capacity.

"As we embark on the early-stage deployment with Eventual Treasury, we're already seeing how intelligent automation can transform agency operations," said Laurie Flanagan, Chief Project Officer at Leavitt Group. "By bringing together real-time reconciliation, zero-touch carrier document ingestion, and built-in quality checks to catch revenue leakage, we're not just improving data accuracy—we're liberating our teams from tedious manual tasks so they can focus on strategic growth. The collaboration with the Eventual Treasury team has been exceptional and is further enabling us to automate workflows."

As Leavitt Group continues to roll out and assess the system's capabilities, both companies remain focused on validating outcomes and iterating based on what delivers real, measurable value.

This partnership reflects a broader trend across the insurance industry: exploring AI not as hype, but as a hands-on tool for operational improvement. Eventual Treasury and Leavitt Group are committed to thoughtful innovation: testing, learning, and leading with integrity.

About Eventual Treasury

Eventual Treasury is a leading provider of AI-driven revenue accounting and optimization infrastructure for the insurance industry. Its intelligent automation platform helps agencies, brokerages, MGAs, and specialty carriers streamline revenue workflows and improve decision-making with clean, actionable data. Learn more at www.eventualtreasury.com.

About Leavitt Group

Leavitt Group is one of the largest privately-held insurance brokerages in the United States, offering a full range of risk management, insurance, and employee benefits solutions. With over 200 affiliate locations, Leavitt Group combines national strength with local focus. Learn more at www.leavitt.com.

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