

Simahi Launches Canada's First AI Operating System With Built-In Disclosure & Compliance

Simahi's new AI operating system helps advisors save hours of admin time with automated disclosures, compliance-ready reports, and real-time client intelligence

MISSISSAUGA, ON, CANADA, December 5, 2025 /EINPresswire.com/ -- Simahi, a fast-growing Canadian technology platform for insurance advisors, today announced the public launch of AskSimahi, an agentic AI assistant designed to automate advisor workflows, generate compliance-ready documentation, and streamline the full lead-to-policy lifecycle. This launch positions Simahi as the first platform in Canada to combine AI-driven need analysis, automated disclosure documents, and interactive advisor intelligence in one unified system.



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Our goal is to give every Canadian advisor enterprise-level AI tools that simplify compliance, elevate client service, and eliminate manual work.”

Manish Jetly

Built specifically for Canadian life and health advisors, Simahi addresses the productivity gap facing independent brokers, MGAs, and small advisory firms. Advisors today spend up to 40% of their time on administration, manual document preparation, and navigating multiple tools. Simahi replaces these fragmented workflows with an AI-powered operating system that understands advisor tasks, automates key steps, and delivers instant answers in plain English.

Introducing AskSimahi — The Advisor's AI Command Center

AskSimahi is designed as a natural-language engine inside the Simahi platform. Advisors can type or speak questions such as:

- “Who do I need to follow up with today?”
- “Show me all policies expiring in the next 30 days.”

- “Prepare a summary for client John.”
- “What applications are missing documents?”

AskSimahi reads data across leads, clients, tasks, policies, quotes, renewals, and reminders, returning real-time insights instantly. Instead of navigating multiple screens, advisors simply ask.

Beyond responding to queries, AskSimahi can initiate workflows: generating follow-up tasks, pre-filling policy data, organizing client notes, or preparing documents for signature. This elevates everyday productivity and reduces the risk of missed renewals, incomplete applications, or compliance oversights.

First in Canada: Automated Disclosure & Compliance-Ready Documentation

One of Simahi’s breakthrough capabilities is its AI-generated disclosure documentation, built in alignment with Canadian insurance requirements.

Simahi is the first advisor platform in the country to automatically generate:

- Full Need Analysis Report
- Advisor Disclosure Statement
- Reason-Why Letter
- Client Decision Acknowledgement

With Agents traditionally producing these documents manually—or not at all due to time constraints—Simahi’s AI engine automatically builds personalized, client-specific reports using advisor input, product details, and suitability logic. Each document is professionally formatted, editable, and stored for compliance records.

This automation not only reduces administrative burden but also helps advisors maintain consistent compliance standards across every client engagement. For MGAs and compliance teams, Simahi offers a reliable way to ensure required disclosures are produced and saved without relying on manual advisor processes.

A Unified Lead-to-Policy Platform for Advisors & MGAs

Simahi centralizes all core advisor workflows into a single system:

- Lead capture & scoring
- Client & family management
- AI-powered need analysis
- Quote preparation & product comparisons
- Policy management & renewals
- Task calendar & smart reminders
- Document generation & storage

- E-signature integrations
- Performance analytics & reporting

Where most CRM tools provide generic sales functionality, Simahi is engineered entirely for the insurance journey, from the first conversation to policy issuance and renewal.

Expansion Into P&C Advisory Technology

Following strong adoption from life and health advisors across Ontario and Alberta, Simahi is preparing to expand into the Personal & Commercial Lines (P&C) sector. The upcoming P&C module will introduce:

- Automated quoting pre-fill
- Digital intake forms
- AI-drafted insurance summaries
- Claims tracking
- Cross-sell opportunity identification

This expansion will allow advisors and brokers to operate both Life & P&C books of business inside one AI-driven platform.

A Canadian-Built Solution for a Canadian Industry

Simahi is fully developed and hosted in Canada, ensuring alignment with PIPEDA, provincial privacy regulations, and industry-specific compliance practices. As major carriers and MGAs begin adopting AI internally, Simahi enables independent advisors to access similar technological advantages without enterprise-level budgets.

Founder Quote

“Our mission with Simahi is simple: give Canadian insurance advisors the tools they need to be more productive, compliant, and client-focused,” said Manish Jetly, Founder of Simahi.

About Simahi

Simahi is an AI-powered operating system for Canadian insurance advisors. Built in Toronto, Simahi simplifies lead management, client onboarding, need analysis, quoting, policy tracking, compliance documentation, and renewals through a single integrated platform.

Manish Jetly

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