Brokers Alliance opens its book data to the AI assistants its partner agencies already use

MyAdvisorData answers an agency's questions about its cases, contracting and commissions from Brokers Alliance's own records, inside a compliance wall

FOUNTAIN HILLS, AZ, UNITED STATES, October 24, 2026 /EINPresswire.com/ -- Brokers Alliance, Inc., the family-owned life and annuity marketing organization founded in 1982, has opened MyAdvisorData, a read-only window into an agency's book of business at Brokers Alliance that the agency's own AI assistant can read. An agency principal connects the assistant the firm already uses, asks in plain English where a case stands, which requirements are open, where a contracting packet sits, or which producers are on the hierarchy, and gets an answer drawn from Brokers Alliance's records, stamped with the date the record was read.

The same answers reach a web screen at app.myadvisordata.ai, where a named user signs in with a second factor and sees one book at a time. Both surfaces read the same signed snapshot of the book, refreshed on a schedule from the systems Brokers Alliance runs its business on: contracting, the hierarchy system, and carrier appointments and licenses, with further views opened per agency on request.

The design draws its lines in the agency's favor. MyAdvisorData is read-only: an agency's questions change nothing at Brokers Alliance. Each principal sees one hierarchy, and downline agents get no login until the principal names them. Case status is visible; commission levels are not, and commission figures appear only for the principal's own producers and only on a view the principal has requested and Brokers Alliance has switched on. Every request is logged, access is revocable in one switch, and every answer carries its source, its as-of time and a note on how complete it is.

The data sits behind a compliance wall built for the purpose and governs what leaves Brokers Alliance. The books and the switches live in separate databases, each delete-protected with point-in-time recovery. The service that answers questions is granted access to its own data only. When something does not line up, the system is built to fail closed rather than guess: a retired principal receives one closed answer on every question, and a snapshot whose signature no longer verifies is not served until it is refreshed. Answers are delivered to the assistant the agency chooses and controls.

MyAdvisorData went live with its first partner agency in October. Agencies that contract through

Brokers Alliance can ask for access through their relationship manager; there is no charge for the platform.

"An agency should not have to wait for a Friday report to learn where its cases stand," said David Racich, owner and CEO of Brokers Alliance. "Its own assistant can ask us, and the answer comes from our records, with the date it was true."

Frontier AI models do the reading; Brokers Alliance's records supply the answers. Details at https://myadvisordata.ai.

About Brokers Alliance, Inc.
One of the country's leading independently owned distributors of life insurance and annuities. Brokers Alliance, Inc. is a family-owned insurance marketing organization based in Fountain Hills, Arizona. Founded in 1982 by Joe Racich and owned and led by David Racich since 2009, the company supports producers across life insurance, annuities and ancillary lines through 73+ carrier relationships. Brokers Alliance develops its own agent technology, including MyAdvisorCloud, MyAdvisorGrids, MyAdvisorRetirement, MyAdvisorQuotes and MyAdvisorData. There is no fee to contract and no monthly platform charge.

David Racich
Brokers Alliance, Inc.
+1 480-210-7892

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