

Leading Insurance TPA Will Use CalcFocus to Support Their Retail Life and Annuity Customers

The TPA will implement CalcFocus Forecast Illustrations and Achieve Policy Administration solutions

PHILADELPHIA, PA, UNITED STATES, August 12, 2025 /EINPresswire.com/ -- [CalcFocus](#) is proud to announce that a leading Third-Party Administrator (TPA) in the Life, Accident and Health market

is implementing the CalcFocus [Achieve](#) policy administration system and CalcFocus [Forecast](#) illustrations for their Individual and Association sold Life and Annuity customers. Products will include Term, Interest Sensitive Whole Life; Major Medical; Universal Life; Whole Life, Flexible Premium Annuity, Immediate Annuities, and Structured Settlements.



We look forward to working with this team as they will serve as a working showcase of how to leverage the robust capabilities of the platform"

Kevin Walma

The CalcFocus end-to-end solution will include Sales Illustrations and quoting; In-force Illustration with Smart Annual Statements; New Business Processing; Billing and Premium Collection; Commissions; and Claims. CalcFocus leverages a common rules and calculation engine to provide end-to-end capabilities using consistent product and customer data throughout the policy lifecycle.

The TPA is seeking to transform its core systems and streamline operational efficiency and enhance their digital strategy. The implementation will enable policy holders direct online access with self service capabilities. This will improve customer service and reduce operational demands. The new systems will also enable faster speed to market for new, more complex products, and less costly policy migrations from the new TPA customers' existing core systems. "As both a carrier and a TPA, we look forward to working with this team as they will serve as a working showcase of how to leverage the robust capabilities of the platform and allow our collective organizations to work together for the benefit of customers. They will offer a wide range of new product offerings and become a leader in real-time digital sales and service." said



Kevin Walma, Chief Revenue Officer at CalcFocus.

Achieve is a comprehensive Individual and Group Life, Annuity, Accident & Health cloud-based policy administration system with a full suite of integrated software components. When deployed with CalcFocus Forecast as an end-to-end solution leveraging the CalcFocus CoreCalc common calculation engine, implementation of new products is faster, connecting to the insurer's ecosystem is easier and omni-channel digital customer service is fully supported. Some Key Benefits of Using CalcFocus Products:

- **Efficient Legacy Management:** Streamlined processes and advanced analytics for managing and optimizing legacy blocks of business.
- **Accelerated Time to Market:** Rapid development and deployment of new products, reducing time frames and increasing competitive advantage.
- **Enhanced Accuracy:** Improved accuracy in actuarial and financial modeling, ensuring reliable and precise outcomes for clients.
- **Cost Reduction:** Significant reductions in operational costs through automation and efficient resource management.

About the TPA

The TPA is a well-established insurance services provider specializing in third-party administration and insurance solutions for employee benefits, managing thousands of members for employer groups and associations. Their expertise spans across various insurance products and services, working with numerous leading insurance carriers to provide comprehensive coverage solutions.

About CalcFocus

CalcFocus, founded in 2014 by insurance technology veterans, offers cloud-hosted web services that augment or replace legacy illustration and policy administration functionalities. The Achieve platform is designed for configurability and quality, providing a comprehensive enterprise solution for policy administration and illustration needs. Learn more at www.calcfocus.com.

Lucy Graham



TPA will implement CalcFocus Forecast Illustrations and Achieve Policy Administration solutions

CalcFocus

marketing@calcfocus.com

Visit us on social media:

[LinkedIn](#)

This press release can be viewed online at: <https://www.einpresswire.com/article/839115885>

EIN Presswire's priority is source transparency. We do not allow opaque clients, and our editors try to be careful about weeding out false and misleading content. As a user, if you see something we have missed, please do bring it to our attention. Your help is welcome. EIN Presswire, Everyone's Internet News Presswire™, tries to define some of the boundaries that are reasonable in today's world. Please see our Editorial Guidelines for more information.

© 1995-2025 Newsmatics Inc. All Right Reserved.