March 4, 2025
FP Partner Inc.

We have introduced an “insurance contract input assistant application” to improve operational efficiency.

～ By systemizing work, we aim to improve operational efficiency. ～

FP Partner Inc. (Headquarters: Bunkyo-ku, Tokyo; Representative Director and President: Tsutomu Kuroki; listed on the Tokyo Stock Exchange Prime Market), has introduced a new “insurance contract input assistant application” on Thursday, February 27, with the aim of improving operational efficiency.

By systemizing work, sales employees can focus on dealing with customers.

We have offices all over the country, and we have built a system that allows customers to receive financial planning services in any region of Japan. In the course of our daily work with many customers and providing financial planning services, when we take out insurance policies for customers, we need to enter the information into both our system and the insurance company's system. This is work that involves the important policy details of our customers, so accuracy is required and it needs to be done carefully over time. On the other hand, this repetitive work and checking work was one of the factors that reduced operational efficiency. Since strict handling of customer information and contract details is required, reliable business execution is necessary, and systemization is essential to achieve this.

By introducing this application, we will be able to automate the input of customer information between our system and the insurance company's system, and systemize routine tasks. This will revolutionize our business processes, allowing our sales staff to focus on dealing with customers, and we expect to see improvements in productivity, work quality, and customer satisfaction.

We will start by introducing this system with some insurance companies, but we will continue to improve and update our existing system, and aim to further improve business efficiency by increasing the number of insurance companies that can use this system.

About Money Doctor

Money Doctor is a service that allows you to consult with our financial planners (FPs) as many times as you like for free about anything related to money, including insurance consultation, asset formation, savings methods, education funding, mortgage loans, inheritance planning, etc. We will provide appropriate advice based on your life plan.

In addition, we have offices in all 47 prefectures across Japan so that we can provide services that are rooted in the local community. We have also put in place a system for managing system security and customer information, so you can consult with us with peace of mind.

Money Doctor is a lifelong partner that enriches the lives of each and every one of our customers.

About FP Partner, Inc.

【Company Profile】

Company name: FP Partner Inc.

Head office location: 5F Koraku Kokusai Building, 1-5-3 Koraku, Bunkyo-ku, Tokyo

Representative: Tsutomu Kuroki, Representative Director and President

Business activities: Insurance agency, financial product brokerage, financial planning services related to financial products

Established: December 2009

ＨＰ：https://fpp.jp/
https://fp-moneydoctor.com/

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