

CUSTOM REPORTING IMPROVEMENTS

1. [CL-4754] - Custom Reporting: allow users to show multiple items from collections (LE Report...)
2. [CL-4755] - Custom Reporting: add option to output one row per transaction (not just one row per case)
3. [CL-4768] - Custom Reporting: cases/transaction in columns rather than rows (transpose)
4. Export Premium Schedules
5. [CL-4756] - allow users to search transactions (not cases) by date range and event type
6. [CL-4753] - Custom Reporting: expand/collapse icon for each section
7. [CL-4739] - Portfolio CSV Export: speed it up by using Custom Reporting (bypass xml)

OTHER IMPROVEMENTS

8. [CL-4749] - Policy Carrier: Add more details to AMBest tooltip, like AMBest Company Number
9. [CL-4760] - Add Death Benefit Type to advanced search
10. [CL-4751] - Remove LegalEntity ReferenceCode (related to AmBest ingest)

BUGS

11. [CL-4758] - Use of management fees causes whoops when exporting valuations
12. [CL-4759] - IRR export scenario setting are not being displayed as percentages
13. [CL-4763] - Single Case Valuation: ensure Premium Schedule from Val Settings is selected
14. [CL-4764] - If a realized IRR calculation fails on portfolio valuation screen, saving fails
15. [CL-4766] - Advanced Search, Last Closing Event: inconsistent results when multiple events have same date
16. [CL-4767] - Advanced Search: Closing Counter party doesn't work when selecting more than one

ClariNet Release Notes – February 2016

Custom Reporting



Custom Reporting Improvements

You now have access to more than 320 ClariNet fields in Custom Reporting. Most of the fields from the Case tab, Policy tab, Insured tab (Insured section and LE Reports), Servicing tab, Bidding Transactions, Closing Transactions and Premium Schedules are available. We have outlined the major changes below.

1. [CL-4754] - Custom Reporting: allow users to show multiple items from collections (LE Report...)

You can now define how many items you want to include in your report for LE Reports and any other list of items. We previously only allowed two LE Reports to be exported.

Available Columns	Selected Columns																																																
<p> : calculated fields computed by ClariNet, not directly editable by users. : more information available by hovering your mouse on the icon.</p> <ul style="list-style-type: none"> Case Case, Cost/Maturity/Disposal Policy Primary Insured Primary Insured LE Reports <ul style="list-style-type: none"> Ins1 LE Report Date Ins1 LE Report LE50 Ins1 LE Report LE50 Median Ins1 LE Report LE85 Ins1 LE Report Mortality Ins1 LE Report Smoking Status Ins1 LE Report Underwriter Ins1 LE Report Weighting Secondary Insured Secondary Insured LE Reports 	<table border="1"> <thead> <tr> <th></th> <th></th> <th>Optional Custom Header</th> </tr> </thead> <tbody> <tr><td>1</td><td>◀ ▶</td><td>Case Reference</td></tr> <tr><td>2</td><td>◀ ▶</td><td>Policy Number</td></tr> <tr><td>3</td><td>◀ ▶</td><td>Ins1 SSN</td></tr> <tr><td>4</td><td>◀ ▶</td><td>Ins1 DOB</td></tr> <tr><td>5</td><td>◀ ▶</td><td>Ins1 Sortable Name</td></tr> <tr><td colspan="3">Repeat this group of columns for the last 5 available items</td></tr> <tr><td>6</td><td>◀ ▶</td><td>Ins1 LE Report Underwriter</td></tr> <tr><td>7</td><td>◀ ▶</td><td>Ins1 LE Report Date</td></tr> <tr><td>8</td><td>◀ ▶</td><td>Ins1 LE Report LE50</td></tr> <tr><td>9</td><td>◀ ▶</td><td>Ins1 LE Report Weighting</td></tr> <tr><td>10</td><td>◀ ▶</td><td>Ins2 SSN</td></tr> <tr><td>11</td><td>◀ ▶</td><td>Ins2 DOB</td></tr> <tr><td>12</td><td>◀ ▶</td><td>Ins2 Sortable Name</td></tr> <tr><td colspan="3">Repeat this group of columns for the last 5 available items</td></tr> <tr><td>13</td><td>◀ ▶</td><td>Ins2 LE Report Underwriter</td></tr> </tbody> </table>			Optional Custom Header	1	◀ ▶	Case Reference	2	◀ ▶	Policy Number	3	◀ ▶	Ins1 SSN	4	◀ ▶	Ins1 DOB	5	◀ ▶	Ins1 Sortable Name	Repeat this group of columns for the last 5 available items			6	◀ ▶	Ins1 LE Report Underwriter	7	◀ ▶	Ins1 LE Report Date	8	◀ ▶	Ins1 LE Report LE50	9	◀ ▶	Ins1 LE Report Weighting	10	◀ ▶	Ins2 SSN	11	◀ ▶	Ins2 DOB	12	◀ ▶	Ins2 Sortable Name	Repeat this group of columns for the last 5 available items			13	◀ ▶	Ins2 LE Report Underwriter
		Optional Custom Header																																															
1	◀ ▶	Case Reference																																															
2	◀ ▶	Policy Number																																															
3	◀ ▶	Ins1 SSN																																															
4	◀ ▶	Ins1 DOB																																															
5	◀ ▶	Ins1 Sortable Name																																															
Repeat this group of columns for the last 5 available items																																																	
6	◀ ▶	Ins1 LE Report Underwriter																																															
7	◀ ▶	Ins1 LE Report Date																																															
8	◀ ▶	Ins1 LE Report LE50																																															
9	◀ ▶	Ins1 LE Report Weighting																																															
10	◀ ▶	Ins2 SSN																																															
11	◀ ▶	Ins2 DOB																																															
12	◀ ▶	Ins2 Sortable Name																																															
Repeat this group of columns for the last 5 available items																																																	
13	◀ ▶	Ins2 LE Report Underwriter																																															

ClariNet Release Notes – February 2016

Custom Reporting



Note that such a group of repeatable columns cannot be split. If you do, an error message will be shown. Simply move the column up or down to remove the error:

Repeat this group of columns for the last		5	available items
6	< ^ v	Ins1 LE Report Underwriter	<input type="text"/>
7	< ^ v	Ins1 LE Report Date	<input type="text"/>
8	< ^ v	Ins1 LE Report LE50	<input type="text"/>
9	< ^ v	Ins2 SSN	<input type="text"/>
✘ This column is part of a repeatable group already used higher up. Please move it to keep them all together.			
10	< ^ v	Ins1 LE Report Weighting	<input type="text"/>
11	< ^ v	Ins2 DOB	<input type="text"/>
12	< ^ v	Ins2 Sortable Name	<input type="text" value="Ins2 Name"/>

2. [CL-4755] - Custom Reporting: add option to output one row per transaction (not just one row per case)

Previously, reporting could only output one row per Case. This was problematic if you wanted to show multiple Transactions in the same Case; for example, you could not build a report that showed all bids received from all counterparties to which you had submitted that Case.

With this release, you can now select how many Transactions you want to include in a report:

Transaction Selection
--please select--
--please select--
Last 1
Highest Bid Only
Latest Closing Only
Last 2
Last 3
Last 4
Last 5
Last 6
Last 7
Last 8
Last 9
Last 10
All Closing

Note that If you select "Last 1", "Highest Bid Only" or "Latest Closing Only", your report will still have one row per Case, as there is only one Transaction to show.

ClariNet Release Notes – February 2016

Custom Reporting



If you select more than one Transaction, all Case-level fields (e.g., Case Reference, Policy Number, Insured Name) will be repeated as many times as there are Transactions. In the example below, the same Case was Received twice and sent twice, therefore four rows are shown:

A	B	C	D	E	F	G	H	I	J	K
Case Reference	Policy Number	Received From	Received On	First Bid On	Last Bid On	Last Bid Accepted On	Last Bid Accepted Amount	Sent To	Sent On	First Bid On
Dummy test case 2	Policy 2	Another Broker Inc	01/01/2016	23/02/2016	23/02/2016	23/02/2016	2000000			
Dummy test case 2	Policy 2							Company A	23/02/2016	23/02/2016
Dummy test case 2	Policy 2							Demo Investor	23/02/2016	
Dummy test case 2	Policy 2	Broker ABC	10/02/2016							

3. [CL-4768] - Custom Reporting: cases/transaction in columns rather than rows (transpose)

You can choose whether you prefer the data to be shown in columns (as previously) or in rows (similar to the Excel Portfolio importer format). Simply check the "Transpose" checkbox:

Custom Report: Closing Report

* Report Name

Closing Report

Transpose

The same report as above would have the four transactions in four columns:

	A	B	C	D	E
1 Case Reference	Dummy test case 2	Dummy test case 2	Dummy test case 2	Dummy test case 2	Dummy test case 2
2 Policy Number	Policy 2	Policy 2	Policy 2	Policy 2	Policy 2
3 Received From	Another Broker Inc				Broker ABC
4 Received On	01/01/2016				10/02/2016
5 First Bid On	23/02/2016				
6 Last Bid On	23/02/2016				
7 Last Bid Accepted On	23/02/2016				
8 Last Bid Accepted Amount	2000000				
9 Sent To		Company A	Demo Investor		
10 Sent On		23/02/2016	23/02/2016		
11 First Bid On		23/02/2016			
12 Last Bid On		23/02/2016			
13 Last Bid Accepted On					
14 Last Bid Accepted Amount					
15 Closing Started On	25/01/2016				
16 Closing Counter Party	Another Broker Inc				
17 Closing Transaction Origination	Secondary				
18 Closing Analyst					
19 Date Offer Accepted	15/01/2016				
20 NDB at Closing	10000000				
21 Closing Completed On					
22 Closing Cancelled On					

This is particularly useful when exporting Premium Schedules where displaying payment dates down the page is more readable than across the page.

ClariNet Release Notes – February 2016

Custom Reporting



4. Export Premium Schedules

Premium Schedules can now be exported easily. You can also show whether a particular Schedule is used in the A2E Settings, Valuations Settings or for Payments on the Premiums tab:

Premium Schedules	
✓ Premium Schedule Data ⓘ	➤
Premium Schedule Description	➤
✓ Premium Schedule Level NDB ⓘ	➤
✓ Premium Schedule Pricing Date ⓘ	➤
Premium Schedule Start Date ⓘ	➤
Premium Schedule Type ⓘ	➤
Premium Schedule Used for Payments ⓘ	➤
Premium Schedule Used in A2E ⓘ	➤
Premium Schedule Used in Valuations ⓘ	➤

This report definition:

*** Report Name**

Transaction Selection

Transpose

Available Columns

📄 : calculated fields computed by ClariNet, not directly editable by users.
ⓘ : more information available by hovering your mouse on the icon.

- Case
- Case, Cost/Maturity/Disposal
- Policy
- Primary Insured

Selected Columns

1	⏪ ⏩ ⏴ ⏵	Case Reference				Optional Custom Header
Repeat this group of columns for the last <input type="text" value="5"/> available items						
2	⏪ ⏩ ⏴ ⏵	Premium Schedule Level NDB				
3	⏪ ⏩ ⏴ ⏵	Premium Schedule Pricing Date				
4	⏪ ⏩ ⏴ ⏵	Premium Schedule Data				

generates the report shown below. The special column "Premium Schedule Data" on the Custom Report designer will be expanded into monthly dates for Premium and NDB amounts.

ClariNet Release Notes – February 2016

Custom Reporting



	A	B	C	D
1	Case Reference	ED003	Dummy test case 2	Case 6690
2	Premium Schedule Level NDB(1)	2000000	5000000	
3	Premium Schedule Pricing Date(1)	29/11/2012	29/11/2012	29/11/2012
4		Premiums	Premiums	Premiums
5	01/05/2010		42731.17	0
6	01/06/2010		0	0
7	01/07/2010		0	0
8	01/08/2010		42731.17	0
9	01/09/2010		0	0
10	01/10/2010		0	0
11	01/11/2010		42731.17	0
12	01/12/2010	0	0	0
13	01/01/2011	0	0	92550.26
14	01/02/2011	0	42731.17	0
15	01/03/2011	0	0	0
16	01/04/2011	0	0	92550.26
17	01/05/2011	7725.47	46502.41	0
18	01/06/2011	0	0	0
19	01/07/2011	0	0	110537.12
20	01/08/2011	7725.47	46502.41	0

Note that the third Case has an Increasing Net Death Benefit, therefore the Level NDB field is blank and the associated NDB Schedule is shown further down in the same column:

315	01/03/2036	0		
316	01/04/2036	18725		
317				IncreasingNDBs
318	01/05/2009			4694753
319	01/06/2009			4694753
320	01/07/2009			5002212
321	01/08/2009			5002212
322	01/09/2009			5002212
323	01/10/2009			5002212
324	01/11/2009			5002212

ClariNet Release Notes – February 2016

Custom Reporting



5. [CL-4756] - allow users to search transactions (not cases) by date range and event type

Searches related to Transaction have been grouped together in the Search Criteria dropdown list:

Received Transaction Event is is not

Case Submitted ▾

From 01/02/2016

To 29/02/2016

Add Search Criteria

-- please select -- ▾ ADD

- Price Allocations
- Provider (Case tab)
- Servicing Carrier
- State of Ownership
- Status
- Status Change Date
- Underwriter
- Universal Death Benefit Type
- Variable Universal Life
- Whole Life
- Transaction Criteria**
- Closing Analyst
- Closing Counter Party
- Closing Event
- Closing Transaction Origination
- Last Closing Event
- Received From
- Received Transaction Event**
- Sent To
- Sent Transaction Event

Using the example above, the results in the Case List will show all cases that have a "Received Transaction" with "Case Submitted" from "1st February" to "29th February 2016" (in other words, "all Cases received this month").

ClariNet Release Notes – February 2016

Custom Reporting



The results (in the Case List on the web page) include this Case, which indeed has a matching Received Transaction from "Broker ABC". When expanded, you can also see an older Received Transaction from "Another Broker Inc":

John Hancock Life Insurance Company Dummy test case 2 10,000,000

Sent Transactions Go to Bid Management

To	Sent	Last Event	Date	Gross Price (\$)	Go
Company A	23/02/2016	Bid	23/02/2016	1,650,000.00	🔍 ➕ ✖ 👤
Demo Investor	23/02/2016	Case Submitted	23/02/2016	-	🔍 ➕ ✖ 👤

Received Transactions +

From	Received	Last Event	Date	Go
Another Broker Inc	01/01/2016	Bid Accepted	23/02/2016	➕ ➖ 🔍 ✖ 👤
Broker ABC	10/02/2016	Case Submitted	10/02/2016	➕ ➖ 🔍 ✖ 👤

When you generate a report for this Case List and your report contains Transactions-related fields, the Transactions are filtered. In this example, this means the non-matching Received Transaction will NOT be shown as it does not match your selected Search Criteria, even if you have set the "Transaction Selection" dropdown on the report builder to "Last 10". The Search Criteria are always applied first.

The report for this example is shown below:

A	B	C	D	E	F	G	H	I	J
Case Reference	Policy Number	Face Amount	Carrier	Received Transaction Counter Party	Received Transaction Origination	Case Submitted On	First Bid On	Last Bid On	Last Bid Total Amount
ED003	Policy 2	10000000	John Hancock Life Insurance Company	Broker All Inc	Tertiary	23/02/2016			
Case 6690	Policy 1	10000000	John Hancock Life Insurance Company	Broker All Inc		23/02/2016			
Dummy test case 2	Policy 2	10000000	John Hancock Life Insurance Company	Broker ABC	Secondary	10/02/2016			
ED002	Policy 3	5000000	John Hancock Life Insurance Company	Broker All Inc	Secondary	23/02/2016	24/02/2016	24/02/2016	1000000

If the Case search doesn't use a Transaction Criteria, and the report definition specified "Last 10" transactions, the report would look like this, with two Received Transactions for "Dummy test case 2":

A	B	C	D	E	F	G	H	I	J
Case Reference	Policy Number	Face Amount	Carrier	Received Transaction Counter Party	Received Transaction Origination	Case Submitted On	First Bid On	Last Bid On	Last Bid Total Amount
Case 6690	Policy 1	10000000	John Hancock Life Insurance Company	Broker All Inc		23/02/2016			
Dummy test case 10	Policy 10	7000000	Protective Life Insurance Company						
ED003	Policy 2	10000000	John Hancock Life Insurance Company	Broker All Inc	Tertiary	23/02/2016			
Dummy test case 2	Policy 2	10000000	John Hancock Life Insurance Company	Another Broker Inc	Secondary	01/01/2016	23/02/2016	23/02/2016	2000000
Dummy test case 2	Policy 2	10000000	John Hancock Life Insurance Company	Broker ABC	Secondary	10/02/2016			

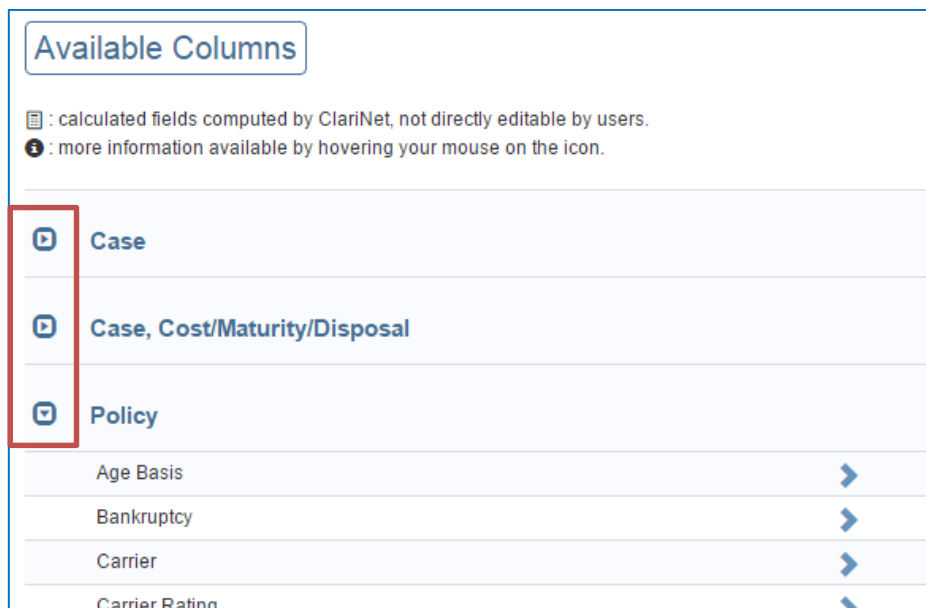
ClariNet Release Notes – February 2016

Custom Reporting



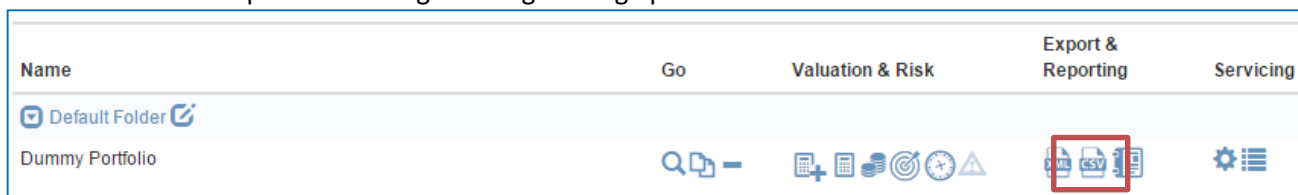
6. [CL-4753] - Custom Reporting: expand/collapse icon for each section

In order to accommodate more than 320 fields, they are grouped in section. Expand or collapse each section by clicking the small arrow in the title:



7. [CL-4739] - Portfolio CSV Export: speed it up by using Custom Reporting (bypass xml)

The Portfolio CSV export was taking too long for large portfolios.



This export now uses the same framework as Custom Reporting and will be faster.

Note that we have also removed the Illustration columns from this export as the many extra 100s of columns added at the end of the report made the report unusable, also contributing to the time taken to generate it and its overall size.

ClariNet Release Notes – February 2016

Custom Reporting



Other Improvements

8. [CL-4749] - Policy Carrier: Add more details to AMBest tooltip, like AMBest Company Number

We have added more AMBest information to the tooltip on the Policy Carrier:

Policy																				
UPRC	PKHG375XAC																			
Policy Number	158																			
Carrier	AXA Equitable Life Insurance Company [NAIC:62944]																			
Issuing Carrier	A+ (Superior)																			
Face Amount	7,000,000	AXA Equitable Life Insurance Company A.M. Best #: 6341 NAIC #: 62944 FEIN #: 13-5570651 Financial Strength Rating Rating A+ (Superior) Financial Size Category XV Outlook Stable Action Affirmed Effective Date 28/08/2015 Rating History <table border="1"> <thead> <tr> <th>Effective Date</th> <th>Rating</th> </tr> </thead> <tbody> <tr><td>28/08/2015</td><td>A+</td></tr> <tr><td>17/07/2014</td><td>A+</td></tr> <tr><td>03/07/2013</td><td>A+</td></tr> <tr><td>06/06/2012</td><td>A+</td></tr> <tr><td>16/12/2011</td><td>A+gu</td></tr> <tr><td>01/07/2011</td><td>A+g</td></tr> <tr><td>04/06/2010</td><td>A+g</td></tr> <tr><td>12/06/2009</td><td>A+g</td></tr> </tbody> </table> <p><i>Note: ClariNet updates AMBest data once per quarter. The last update was on 01/02/2016.</i></p>	Effective Date	Rating	28/08/2015	A+	17/07/2014	A+	03/07/2013	A+	06/06/2012	A+	16/12/2011	A+gu	01/07/2011	A+g	04/06/2010	A+g	12/06/2009	A+g
Effective Date	Rating																			
28/08/2015	A+																			
17/07/2014	A+																			
03/07/2013	A+																			
06/06/2012	A+																			
16/12/2011	A+gu																			
01/07/2011	A+g																			
04/06/2010	A+g																			
12/06/2009	A+g																			
Extended DB Rider Period	120																			
Policy Date	10/11/2010																			
Policy Issue Date	10/11/2010																			
Issue State	California																			
Policy Type	Universal																			
Death Benefit Type	Level																			
Return Type	Non-variable																			
Coverage Type	Individual																			
Age Basis	ANB																			
Policy Lapse Basis	AV																			
Policy Form	-																			
Policy Product	Athena																			
Percent Of Premium Charge	0 %																			
POPC Above Target	0 %																			
Default Per Unit Charge	0 \$ Mon																			
Default Per Policy Charge	0 \$ Mon																			

You can also click on the AMBest logo and the same information is now shown in a popup window which you can copy/paste:

Athene Annuity and Life Company

A.M. Best #: 6199
 NAIC #: 61689
 FEIN #: 42-0175020

Financial Strength Rating

Rating: A- (Excellent)
 Financial Size Category: XV
 Outlook: Stable
 Action: Upgraded
 Effective Date: 21/04/2015

Rating History

Effective Date	Rating
21/04/2015	A-
17/10/2014	B++
03/10/2013	B++
03/10/2013	B++
03/10/2013	B++
21/12/2012	A-
06/06/2012	A
15/12/2011	Au
30/11/2010	A
12/11/2009	Ag

Name History

Athene Annuity and Life Company
 Athene Annuity & Life Company
 Aviva Life and Annuity Company

*Note: ClariNet updates AMBest data once per quarter.
 The last update was on 01/02/2016.*

[Close](#)

9. [CL-4760] - Add Death Benefit Type to advanced search

New Search Criteria to find Cases with a non-level Net Death Benefit:

Universal Death Benefit Type is is not

Add Search Criteria

None selected ▾

Level

Face Plus Account Value

Return Of Premium

Face Plus Surrender Value

ClariNet Release Notes – February 2016

Custom Reporting



10. [CL-4751] - Remove LegalEntity ReferenceCode (related to AmBest ingest)

ClariNet had created its own Reference Code for Carriers, made of 10 characters. You might have used it in the Portfolio Excel importer:

	A	B	C
1	Case Reference	Case 001	Case 002
2	Policy		
3	Policy Number	TX001	TX002
4	Policy Date	05/05/1995	01/08/2001
5	Carrier Reference	TRANSAMERI	TRANSAMERI
6	Face Amount	1200000	800000

This Code was not used in any other areas and is internal to ClariNet. We have now fully removed it. You can use full name or NAIC number in the Excel Portfolio importer.

Bugs

11. [CL-4758] - Use of management fees causes whoops when exporting valuations

When using a management fee, a Portfolio Valuation would be generated and saved correctly. However, it would crash when exporting the Valuation to CSV. This is now fixed.

12. [CL-4759] - IRR export scenario setting are not being displayed as percentages

On the Admin menu, Pricing and Risk, IRR tab, the Base IRR was not saved correctly. It is shown as a percentage, but was stored as a normal number (therefore, you had to enter 0.1 to mean 10%). This is now fixed.

Portfolio Valuation IRR CSV

Base IRR

10 %

increment

2 %

Number Of Values

5

ClariNet Release Notes – February 2016

Custom Reporting



13. [CL-4763] - Single Case Valuation: ensure Premium Schedule from Val Settings is selected

On the single Case pricing page, the Premium Schedule used in the Valuation Settings is now automatically selected. It was previously selecting the last item in the list.

Valuation

Policy

Carrier: John Hancock Life Insurance Company Policy Date: 28/08/2008

Premium Schedule +

Pricing Date	Start Date	Description	Illustration	VOC	Use?	Go
29/11/2012	15/12/2010	CSV Upload on 24/02/2016 08:51	-		<input checked="" type="radio"/>	
24/02/2016	28/08/2009				<input type="radio"/>	
24/02/2016	24/02/2016	Test 2			<input type="radio"/>	

Case Summary

Case
Policy
Insured Life
Illustrations
Verifications of Coverage
Bid History
Documents
Servicing
Order Tracking

Pricing Settings
Valuation Settings
Cost/Maturity/Disposal
Comments
Premiums
Fees
Valuations
Compliance Checklist

Grace Notices
Audit Log

Portfolio Valuation Settings

Show Settings for: Valuations Actual Expected Use same Settings for both

Premium Schedules

Pricing Date	Start Date	Description	Use?
29/11/2012	15/12/2010	CSV Upload on 24/02/2016 08:51	<input checked="" type="radio"/>
24/02/2016	28/08/2009		<input type="radio"/>
24/02/2016	24/02/2016	Test 2	<input type="radio"/>
-	-	Use Most Recent (by Pricing Date)	<input type="radio"/>

ClariNet Release Notes – February 2016

Custom Reporting



14. [CL-4764] - If a realized IRR calculation fails on portfolio valuation screen, saving fails

This has now been fixed.

15. [CL-4766] - Advanced Search, Last Closing Event: inconsistent results when multiple events have same date

When using the Last Closing Event criteria in the Advanced Search:

A screenshot of the Advanced Search interface. The search criteria is set to "Last Closing Event" with the operator "is" selected. The value entered in the dropdown menu is "Offer Acceptance".

The results would not always show the correct matches if multiple events have the same date, as shown in this example:

A screenshot of the "Closing Summary" page. The "Transaction Origination" is "Secondary". Below the "Event History" section, there is a table with the following data:

Recorded Event	Event Date	Recorded On
Closing Process Started	29/09/2015	04/01/2016 21:11
Price Allocation Completed	29/09/2015	04/01/2016 21:56
Case Participants Completed	29/09/2015	04/01/2016 22:45
Offer Acceptance	29/09/2015	23/02/2016 23:09

16. [CL-4767] - Advanced Search: Closing Counter party doesn't work when selecting more than one

Searching for more than Closing Counter Party would generate an error. This has now been fixed.

A screenshot of the Advanced Search interface. The search criteria is set to "Closing Counter Party" with the operator "is" selected. The value entered in the dropdown menu is "Ashar Group, LLC (7), GWG Life Settlements, LLC (21), Test Broker (1)".