12-03-2026 LifePipe & iSolve Dec 2026 Release Notes

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LifePipe & iSolve: December 2026 Release

Release Date: December 03, 2026

NEW FEATURES / ENHANCEMENTS

Saved Quotes Retention and Performance Improvements

Impacts / Availability: Automatic feature (feature is automatically available with base upgrade)

What's Changing:

To improve the performance and reliability of saved quotes in LifePipe and iSolve, we are updating the underlying storage architecture used by the Save Quote feature. As part of this change, saved quotes older than two years will no longer be retained in the system. This enhancement also establishes the foundation for future data retention capabilities.

Customer Impact:
Beginning with this release:

- Saved quotes created before **December 1, 2024** will no longer be accessible.
- Saved quotes created on or after **December 1, 2024** will remain available.
- The change applies only to quotes saved through the **Save Quote** feature.

Customers who need access to saved quotes older than two years should export or document any required information before the release.

Benefits:

The updated solution provides:

- Faster access to saved quotes

- Improved *My Quotes* performance
- Enhanced scalability and reliability
- Continued support for larger, more complex quotes

Looking Ahead: Planned Data Retention Policy

This release lays the foundation for a formal Saved Quotes data retention policy planned for H1 2027.

Our current direction is to retain saved quotes for **120 days from their last activity date** (save or edit). This timeframe is intended to support the typical life insurance sales process while remaining longer than the retention period used for iGO e-Applications.

A retention policy helps reduce the amount of outdated customer information stored in the platform, supporting data privacy, security, and responsible information management. Future retention is expected to be based on quote activity rather than quote age. This approach also aligns with our broader efforts to strengthen data protection practices and reduce the amount of sensitive customer information retained beyond its useful business purpose.

While we are currently retaining saved quotes created on or after December 1, 2024, the planned retention policy would automatically remove saved quotes that have not been updated or accessed within the configured retention period.

We acknowledge that some organizations may have business processes that expect saved quotes to be retained for longer than 120 days. As this policy is still under consideration, we encourage customers with potential concerns or unique use cases to contact Product Management so we can better understand your requirements before a final policy is implemented.
