The future of Keylane Platforms

Turning intelligence into customer value

8 October 2026

Keylane



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At Keylane since 2026

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Agenda

01 **Portfolio today**
How the product portfolio fits together

02 **Delivery proof**
What changed in the last 12 months

03 **AI in the products**
Architecture, use cases and workflow

04 **2027 priorities**
Directional roadmap and highlights

05 **Next steps**
Breakout choices and discussions

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One portfolio, shared capabilities

How core platforms, front-end solutions and shared modules fit together.

L&P Platforms and shared capabilities by market

	NL*	DK	NO	BE	UK	NA
Collective DC	Plexus			UL3	Plexus	
Collective DB/DC	Lifetime				Altair	
Individual Life	LeanApps Life			UL3		
Advice	Obex	Obex	Obex	Obex	Obex	
Portals	PDE	PDE			PDE	
Data hub	Benefits-Plaza					
AI & orchestration	Keylane **Automate** — AI and end-to-end orchestration					
Shared modules	Video Engage					
	Disbursement					
	UCM2**					

**NL includes Caribbean (LT, BP, PDE). **Uniform Calculation Method 2*

Core platform Module Potential expansion

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02

Delivery proof

Eight launches show the portfolio is moving

A concise view of what changed across platforms in the last 12 months.

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Eight launches and upgrades across the product portfolio

01 Plexus

Upgraded the workflow editor; deepened Pension Act support and strengthen our API and integrations. In parallel, we're building out the Norwegian localisation.

02 Lifetime

Enhanced standard template for SPR; addition of administration of reserves within Lifetime; adding UCM calculations for SPR.

03 LeanApps Life

Added WTP FPR transition communications and upgraded UCM to UCM2 for stronger functionality and performance.

04 UCM2

Expanded the shared module with SPR calculations and performance improvements for growing portfolios.

05 PDE

Delivered portals for HP, Exxon and SPH; extended Advisor and Employer portals; added personalised **Video Engage** communications.

06 Obex

Delivered wealth and senior advisory across real estate, pensions and liquid assets, plus a new expense-estimate service.

07 Benefits-Plaza

Launched the LoonAangifteKeten (LAK) module for standardised fund collection and a new Caribbean employer portal.

08 Disbursements

Delivered a shared Keylane Disbursements module across L&P, replacing the Maia Fusion version.

AI creates value when it is embedded in the workflow

From platform architecture to an example of existing product extension.

Trusted platform. Governed by design

Keylane Automate

The AI and orchestration layer for insurance and pensions.

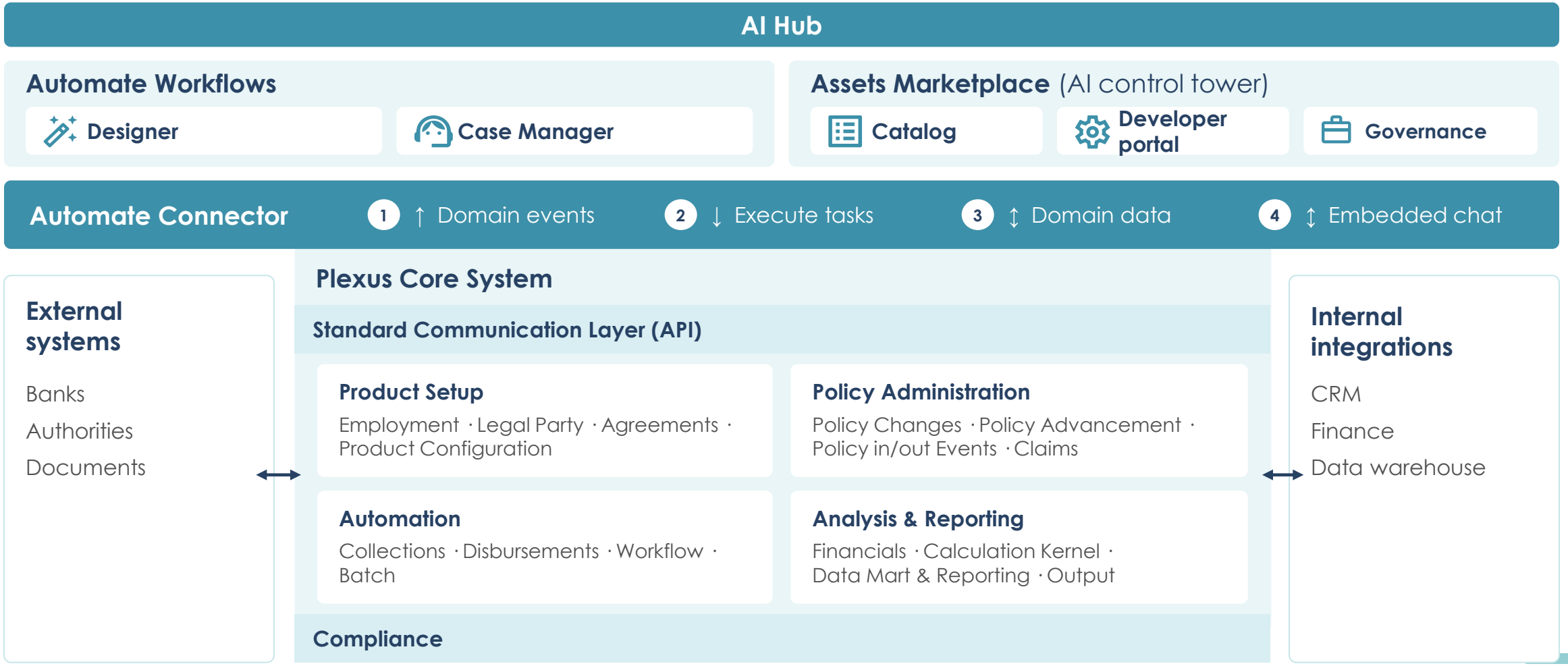
- AI intelligence
- Connected workflows
- Control & oversight

One intelligent layer. **Every Keylane platform.**

- Plexus
- LeanApps Life
- Lifetime
- Obex

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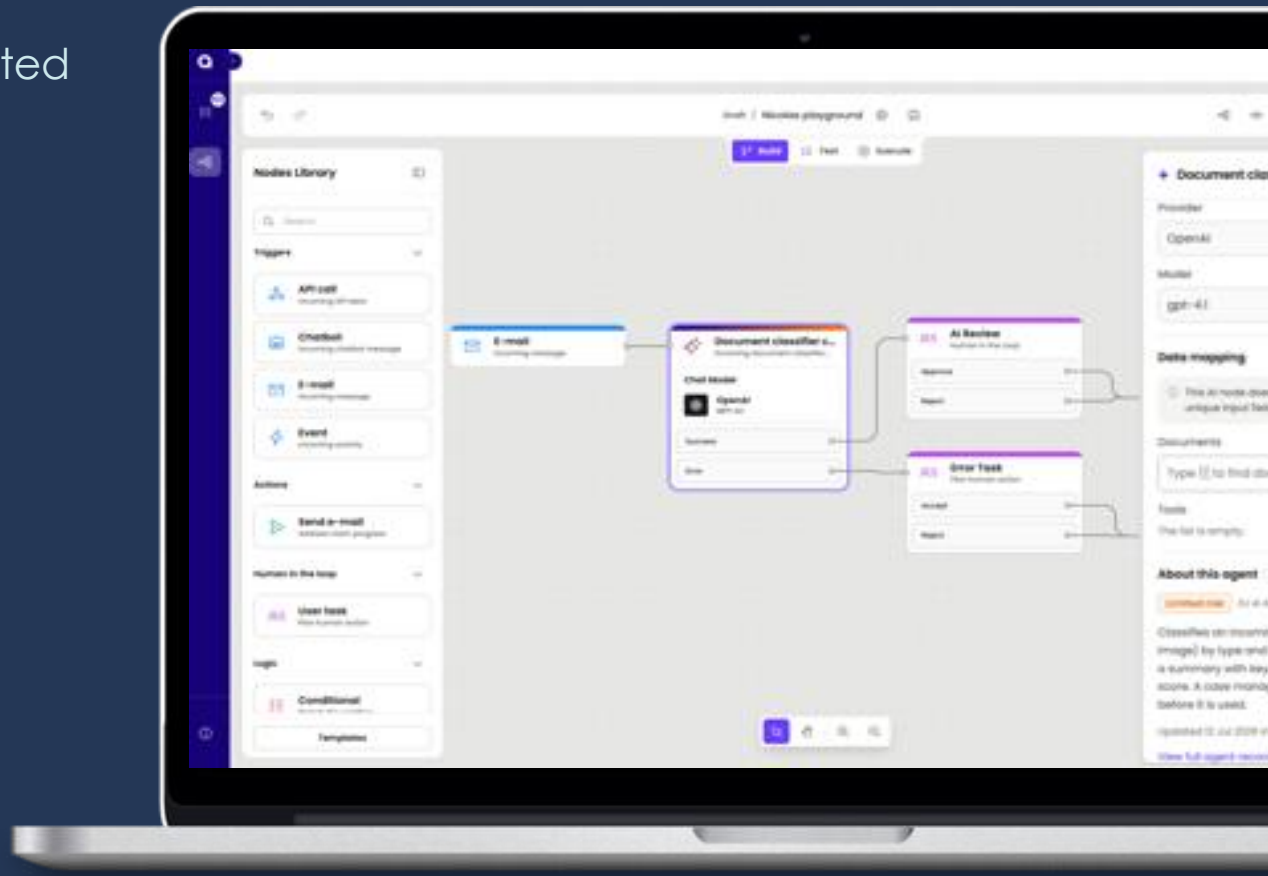
Keylane Platform AI Strategy



AI-Augmented workflows

Rapid development of insurance & pensions AI-augmented workflow applications. Combines deterministic and probabilistic approaches.

- Visual, no code experience, from ideas to apps in minutes/hours. AI as first class citizen.
- Built-in core systems connectors, removes the need for an integration layer.
- Case manager, human-in-the-loop, keep control. Work assignment and management. Audit trails and workflow dashboards.



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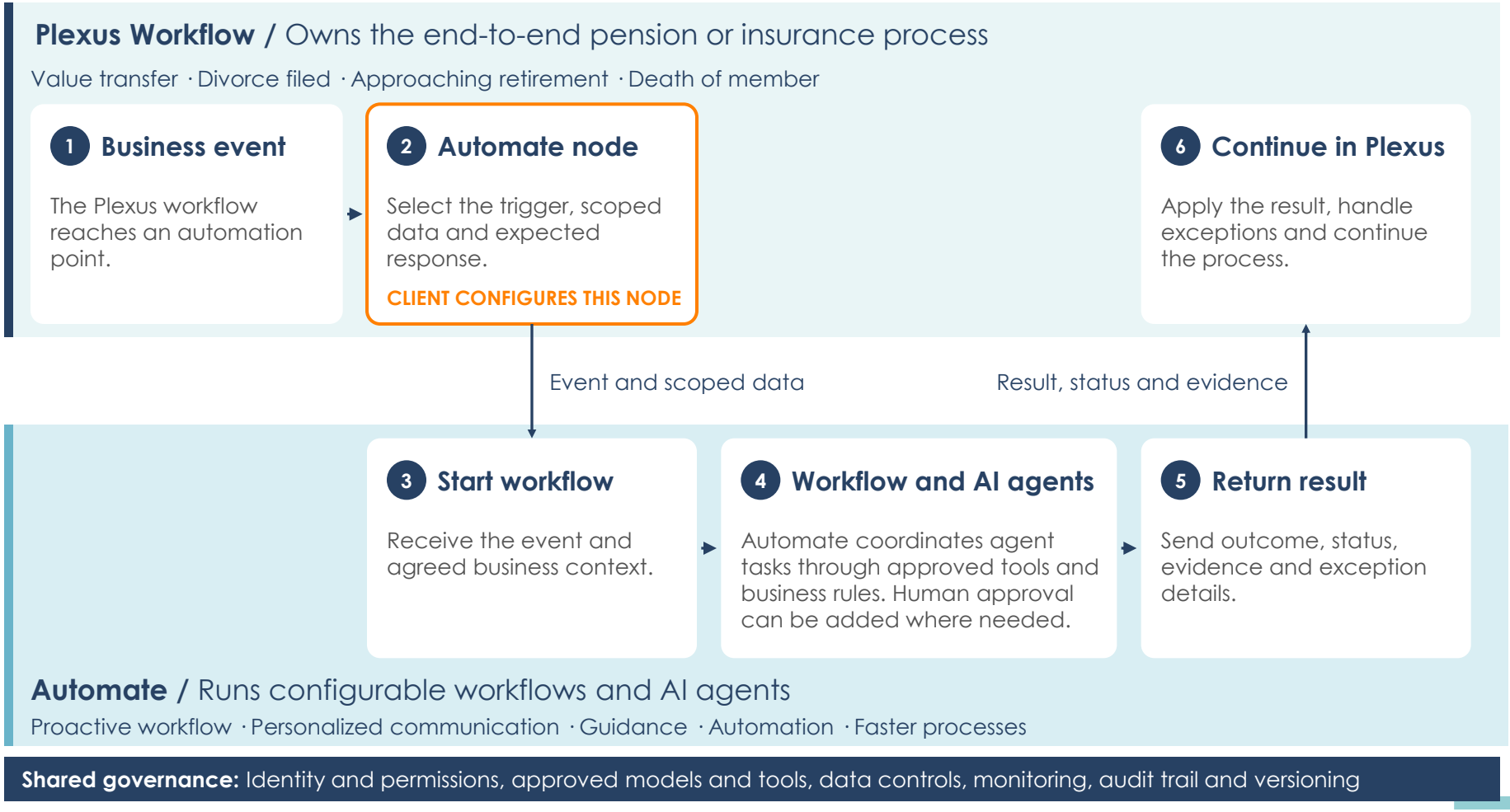
Life & Pension use cases

Trigger	Keylane Plexus Use Case (AI Agents · Workflow · People)	Outcome
Retirement, Death, Divorce, Transfer out, Transfer in, Deferral, Scheme Switch	**Members Lifecycle Orchestration** Every member moment lifecycle moment intelligently orchestrated	**Case closed timely, in full transparency**
Benefit change, retirement eligibility, annual statement, … triggers a comm. event	**Members Communications** Member receives timely, accurate, personalized communication, any language	**Personalised communication**
Member contact, complaint or service request creates a task	**Intelligent Service Assistance** AI assisted case resolution with preparation, suggestions, drafts.	**Average handle time reduced, better service**
Pension holder unreachable	**Find the Unfindable** Anticipates pension holder identification and retrieval of contact information	**Pension holder contacts updated**

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Extend Plexus workflow with Automate

Clients configure an Automate node in Plexus. Automate runs the selected workflow and agents, then returns the result to the core process.



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04

2027 priorities

Shared capabilities connect the 2027 roadmap

Directional – not yet confirmed priorities across platforms and modules.

What we will deliver 2027 / Directional

01 Plexus

Norwegian layer, connectors to **Automate**, performance improvements to keep up with growing portfolios. Support **transporting configurations** between environments.

02 Lifetime

AI chatbot, technological upgrades, Modernising stack & tools (CVS-to GIT; Eclips to IntelliJ; Ant to Gradle); enhancements in financial reporting for SPR.

03 LeanApps Life

Workflow capabilities through Keylane **Automate** and various enhancements to both ensure future performance and aligned with local regulations (Fiscal tax reporting 2028).

04 PDE

Video engage. Investigations AI in portals. Statistics employer and advisor portals. Configurable portals (Headless **CMS**). Life insurance standard portals.

05 Obex

Modernising user experience, **Financial planning with AI** and preparing the platform for international markets.

06 Benefits-Plaza

Modularising Benefits-Plaza and combining it with **UPA** to enable **PPA** (Professionele Pensioenaangifte). Adding multi-tenant SaaS alongside single-tenant UPA and rolling out **LAK** for pension administrators and funds.

Choose the conversation most relevant to you

Two break-out rounds to turn the roadmap into focused product discussions.

Choose one track per time slot / 30 min coffee break at 14:15

13:30 – 14:15

1A - Explore how Keylane Automate and Asset Marketplace help organisations accelerate delivery, reuse proven assets, and drive scalable innovation across teams

Nicolas Marzin - Director AI Strategy, Keylane Group

The Kari

1B - Accelerate digital engagement through configurable customer portals

Eric Bastiaansen - Senior Manager, Keylane L&P

The Howard

1C - Keylane's approach to compliant AI: How compliance shapes AI adoption

Mirella Dauer - General Counsel, Keylane Group
Gülfem Arslan - Legal Counsel, Keylane Group

The Louis

1D - Unlock the value of payroll data: How the payroll tax reporting chain Loonaangifteketen is transforming data exchange

Andries van den Breemer - Manager Delivery, Keylane L&P

The Jack

14:45 – 15:30

2A - Explore how Keylane Automate and Asset Marketplace help organisations accelerate delivery, reuse proven assets, and drive scalable innovation across teams

Nicolas Marzin - Director AI Strategy, Keylane Group

The Kari

2B - Accelerate digital engagement through configurable customer portals

Eric Bastiaansen - Senior Manager, Keylane L&P

The Howard

2C - Simplify pension payments and outgoing cash flows through a flexible, back-office independent solution

Marvin Young On - Senior Consultant, Keylane L&P
Ernst-Jan Strijker - Managing Consultant, Keylane L&P

The Louis

2D - Unlock smarter financial planning with AI and elevate your advisory services with Obex

Martin Jönsson - Director Obex, Keylane L&P

The Jack

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Building the future of Life & Pension – together.

Questions or Comments

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