

ADDITIONAL SERVICES FOR OUR FINANCIAL BROKER CLIENTS

**BROKER
WEBSITES**

**Mobile &
Broker Website
CLIENT
PORTFOLIO**

**Broker Website
MOBILE
OPTIMISED**

**Mobile &
Broker Website
PROTECTION
QUOTATIONS**

**Mobile &
Broker Website
CLIENT DATA
CAPTURE**

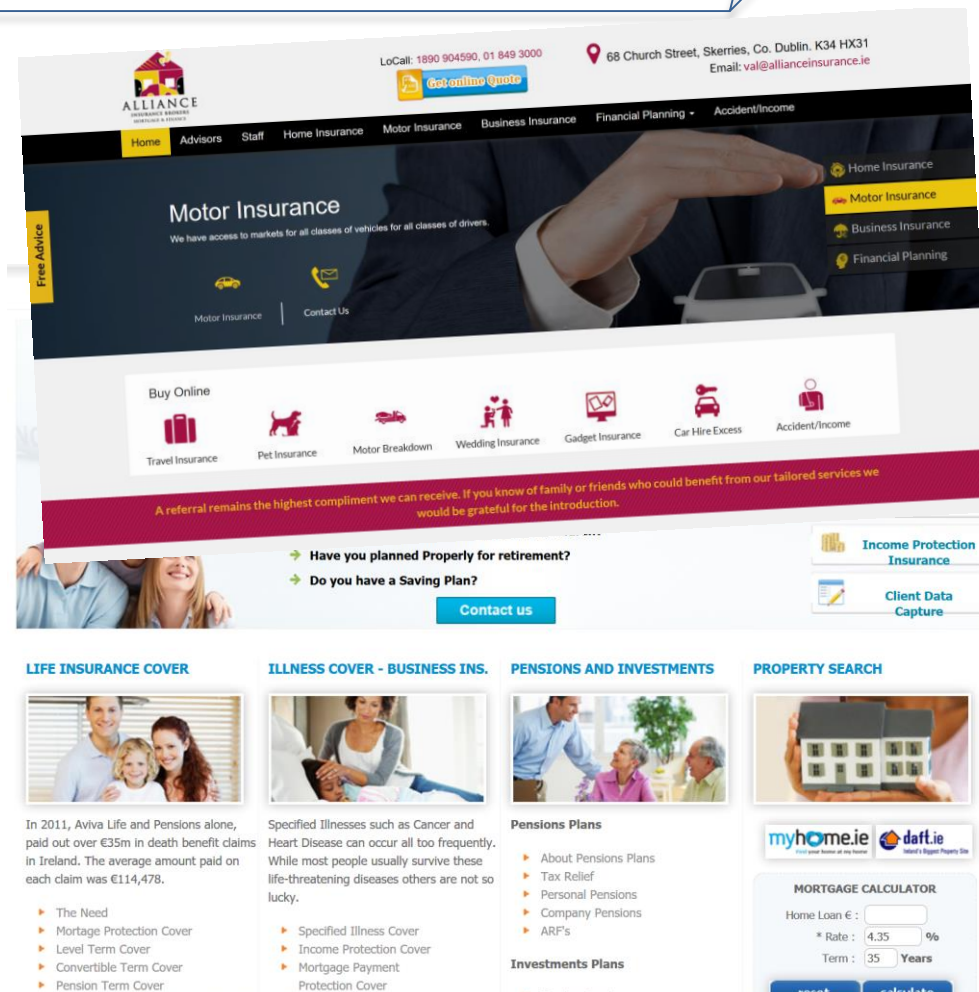
**Mobile App
DOCUMENT
SCANNER**

Design and Develop Financial Broker web sites



Delivering user-friendly web sites that work closely with your
Money Advice +CRM

- ✓ An integrated approach with **Money Advice +CRM** from the start where we build and deliver broker websites ensuring maximum results and return on investment from both the new web site and **Money Advice +CRM**.
- ✓ Clear focus on user experience so as to make it easy to use and navigate for your clients
- ✓ Aftercare and support to keep the web site updated always.
- ✓ We can provide life protection quotes, with the broker selecting if they wish to provide discounts to their clients.
- ✓ We can also provide client access through broker websites to client portfolio reports with updated values etc.



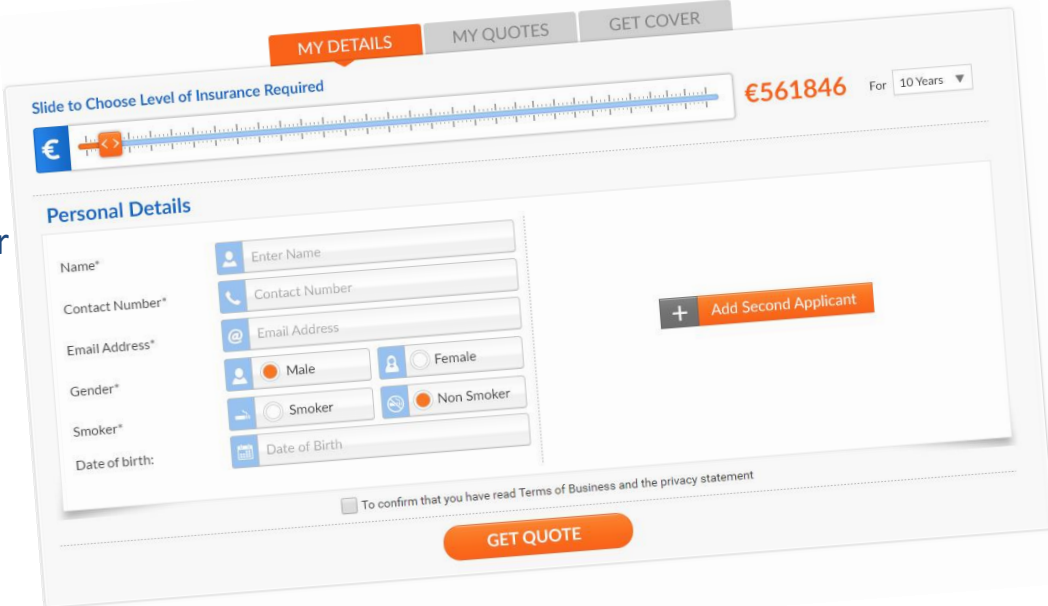
The screenshot displays the Alliance Insurance website interface. At the top, there is a navigation bar with links for Home, Advisors, Staff, Home Insurance, Motor Insurance, Business Insurance, Financial Planning, and Accident/Income. A prominent 'Motor Insurance' section features a large image of a hand pointing at a car. Below this, a 'Buy Online' section lists various services: Travel Insurance, Pet Insurance, Motor Breakdown, Wedding Insurance, Gadget Insurance, Car Hire Excess, and Accident/Income. A red banner below the services contains a testimonial: 'A referral remains the highest compliment we can receive. If you know of family or friends who could benefit from our tailored services we would be grateful for the introduction.' Below the banner, there are two questions: 'Have you planned Properly for retirement?' and 'Do you have a Saving Plan?', with a 'Contact us' button. The bottom of the page is divided into four columns: 'LIFE INSURANCE COVER', 'ILLNESS COVER - BUSINESS INS.', 'PENSIONS AND INVESTMENTS', and 'PROPERTY SEARCH'. Each column contains a small image, a brief description, and a list of services or products. The 'PROPERTY SEARCH' column includes a 'myhome.ie' and 'daft.ie' logo and a 'MORTGAGE CALCULATOR' with input fields for Home Loan, Rate, and Term, and 'reset' and 'calculate' buttons.

Protection quotations for Financial Broker web sites



Provide advice through best price (discounted) quotes on your web site and receive email notifications of all the enquiries generated.

- ✓ Integrate with existing Financial Broker web sites seamlessly. Best price quotations available
- ✓ The screens can be customised to look similar to the broker website colours
- ✓ The service provides all term assurance, specified illness, income protection and mortgage protection quotations



The screenshot displays a web interface for generating insurance quotes. At the top, there are three tabs: 'MY DETAILS' (highlighted in orange), 'MY QUOTES', and 'GET COVER'. Below the tabs is a slider control labeled 'Slide to Choose Level of Insurance Required' with a blue bar and a red arrow. To the right of the slider, the quote amount '€561846' is displayed in orange, followed by 'For 10 Years' with a dropdown arrow. The main section is titled 'Personal Details' and contains several input fields: 'Name*' with a person icon and 'Enter Name' placeholder; 'Contact Number*' with a phone icon and 'Contact Number' placeholder; 'Email Address*' with an '@' icon and 'Email Address' placeholder; 'Gender*' with radio buttons for 'Male' (selected) and 'Female'; 'Smoker*' with radio buttons for 'Smoker' and 'Non Smoker' (selected); and 'Date of Birth:' with a calendar icon and 'Date of Birth' placeholder. A button with a plus sign and 'Add Second Applicant.' is located to the right of the form. At the bottom, there is a checkbox labeled 'To confirm that you have read Terms of Business and the privacy statement' and a large orange 'GET QUOTE' button.

Only the best price quotation is shown without identifying the insurer.


MY DETAILS MY QUOTES GET COVER


Quote Details


We Compared 6 Insurers and the lowest price is


€ 10.00 * per Month


Select how you wish to proceed below














Apply
Send me the Forms

Mortgage Protection Quote

Product Provider	: Irish Life	<div style="background-color: #0056b3; color: white; padding: 5px; border-radius: 5px;">€15.15</div> <small>Monthly Premium</small>
Product Type	: Mortgage Repayment Protection	
Total Repayment Cover	: €100000	<div style="background-color: #0056b3; color: white; padding: 5px; border-radius: 5px;">€136.35</div> <small>Cash Refund</small>
Monthly Premium	: €15.15	
75% cash Refund	: €136.35	

Discounts provided by the brokers can also be accommodated

Protection quotations for Financial Broker web sites

Capture key contact information of the lead generated. All enquiries are emailed to a pre-configured email address

MY DETAILS MY QUOTES **GET COVER**

Fast track application

- Book a 10 minute call with an advisor to complete your application & sign it online within minutes. (Either call 012539863 during office hours or request a call back below)
- (Alternatively, request a blank application form to fill out in your own time)

Your Details

Full Name	<input type="text" value="Name"/>	Address 1	<input type="text" value="Address 1"/>
Your Number	<input type="text" value="Contact Number"/>	Address 2	<input type="text" value="Address 2"/>
What's the best time to call?	<input type="text" value="9:30 AM - 1:00 PM"/>	City	<input type="text" value="City"/>
Alternatively leave your address	<input type="text" value="Email"/>	County	<input type="text" value="Dublin"/>

Send

Enquiries

Name: Status:

Assign To: Source of Business: **Search**

Date Added From: Date Added To: **Clear**

Add Enquiry **Refresh** **Assign To**

Name	External Reference	Status	Added By
Test Data	8564	Draft	Web

The key details of the lead and quote are pre-populated as a new enquiry

Client portfolio report for Financial Broker websites



Deliver policy, portfolio information to clients in a secure, interactive manner any time on their pc, smart phone or tablet

- ✓ Integrate with existing Financial Broker web sites seamlessly
- ✓ A secure area to which the client logs in using their email address and PIN to view their portfolio information.
- ✓ The broker can chose the clients who will have access to the system and send them their individual login details.

To view your portfolio report(products and policies arranged by us on your behalf), please contact your [broker](#).

[Login to check your policies with Us](#)



Login

Client portfolio report for Financial Broker websites

- ✓ An online daily snapshot of client's pension, protection and investment policy information and associated values across all the insurers (also mortgages)
- ✓ Updates from insurer data feeds reflect on the site immediately. Broker also has an option to update policy information as appropriate using Money Advice.
- ✓ Detailed benefit, fund information as relevant for each policy

Dermot P Wall	
Provider	Irish Life
Policy Number	5678765
Description	Convertible Term
Premium	€67.00 (Monthly)
Status	In Force
Value / Benefit Details	Dermot P Wall: Life Cover €125,000.00 Dermot P Wall: Serious Illness €34,000.00 Dermot P Wall: Income Protection €9,000.00

Dermot P Wall	
Provider	Aviva Life
Policy Number	Data Not Available
Description	Convertible Term

Select Policy Type Mortgage Protection Pension Investment and Savings

Client data capture for Financial Broker web sites



Fact Finding online and save the need for redundant visits for the broker and customers

- ✓ Integrate with existing broker web sites seamlessly
- ✓ The service is tailored for both existing customers and new prospects. Both financial and mortgage data captures are available.
- ✓ Existing customers can log in using a unique PIN & update any changes in their circumstances, immediately to **Money Advice +CRM**.
- ✓ New clients can enter their details in a secure fashion and these will be created as enquiries in **Money Advice +CRM**



This is the Private Client area of our website ,where customers are given a facility to submit their personal information to their financial adviser online in a data secure environment and in strict confidence. The information provided enables the adviser quickly provide detailed information to clients in relation to their investments, pensions, savings, protection (life insurance, specified illness, income protection etc.) and mortgage requirements including costings.

If you are an existing client and your adviser provided you with authorization details for access

[Please click here](#)

If you are a new client and would like to submit your information for our review

[Please click here](#)

Mobile / Tablet optimised web sites

How does your website look on a mobile or tablet?

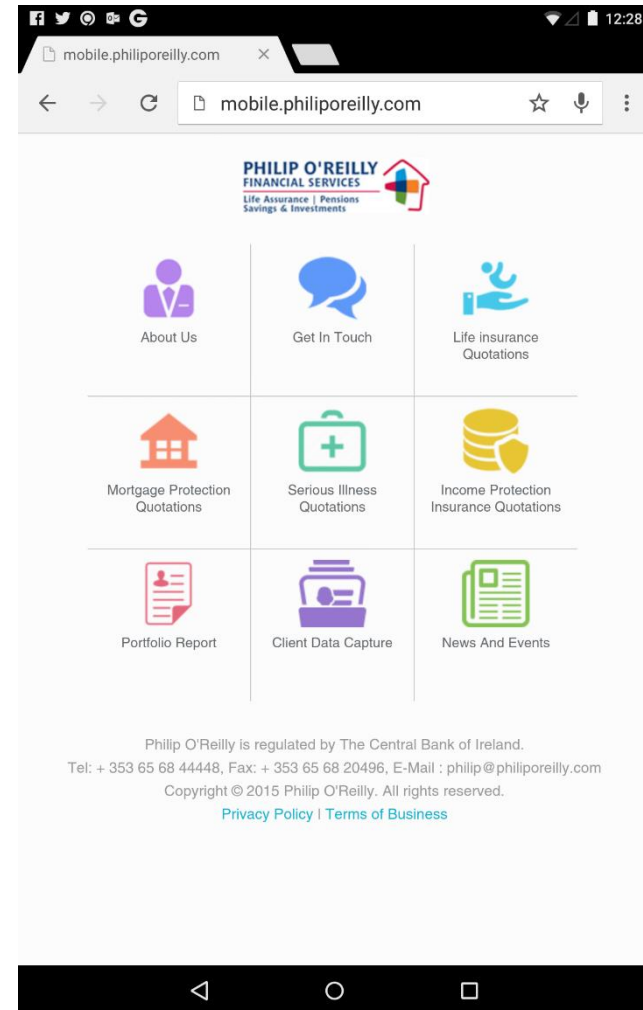
- *Very small and you can not read without pinching and zooming?*
- *Takes a long time to load because of all the images?*

Then you may not be providing an ideal user experience to about 61% of people (based on a report from Google) who search for your business on their smart phones before calling you.

A mobile / tablet optimised web site overcomes this problem by presenting just the right and relevant set of information in a specifically tailored format that works on the various smart phone devices. It not only increases the traffic to your web site by better SEO ranking but also helps in improving the conversion rate of the visitors.

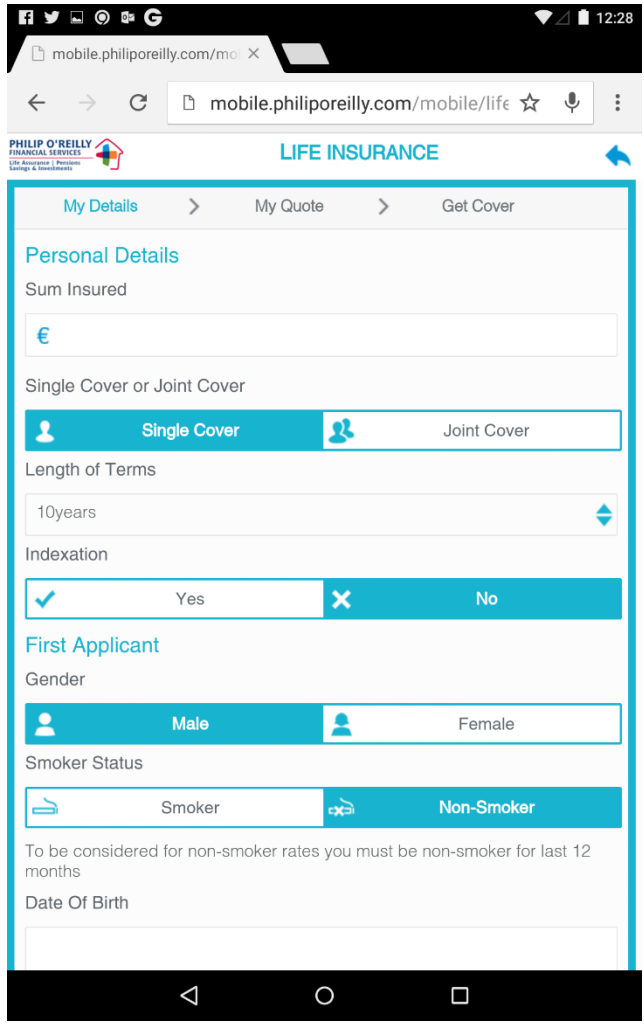
We at **Money Advice** can help you create your own mobile optimised web site incorporating all the features that users to your site would be looking for in one complete package. When a prospect / customer opens your web site from a mobile, they will be redirected to the mobile optimised version.

Sample: log on from your smart phone to www.philiporeilly.com

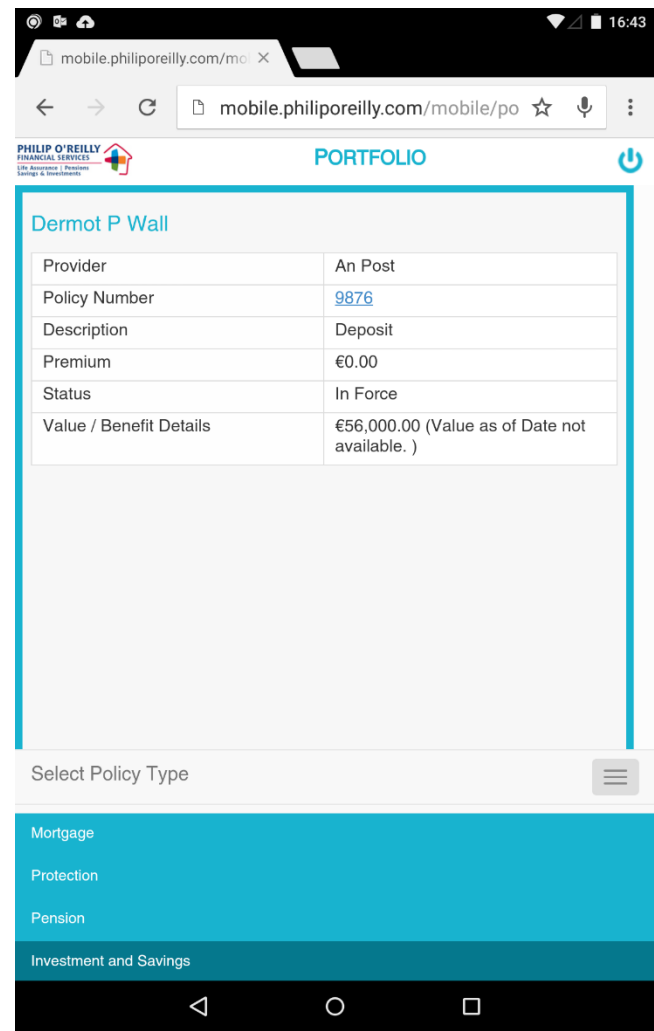


Mobile optimised web sites - Features

Provide advice through best price quotes

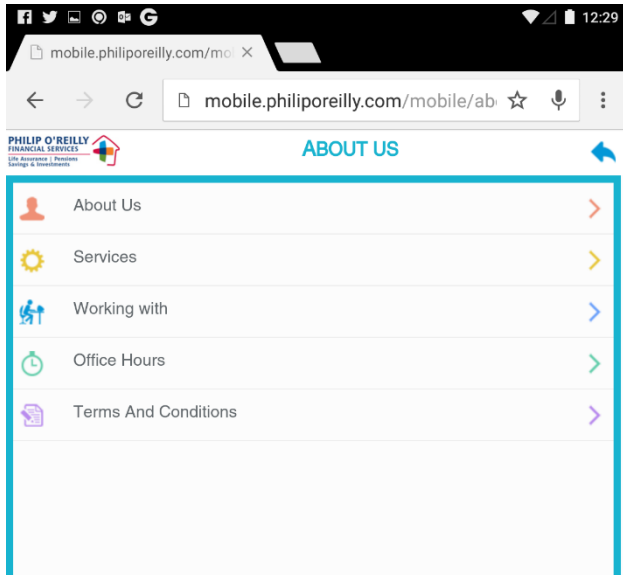


Deliver policy, portfolio information to selected clients in an interactive manner

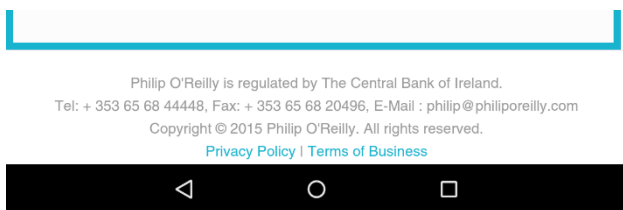


Mobile optimised web sites - Features

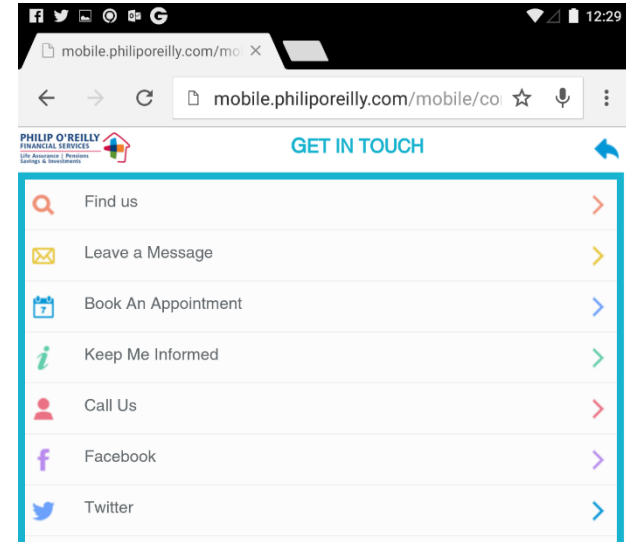
Tell your customers more about your services, news, blogs, and events through mobile optimised content



- ✓ Choose the content you would like to include in the site
- ✓ Manage the content through a Content Management System (CMS)



Engage more closely with your prospects and customers



Utilities like :

- ✓ Social media integration—Twitter, Facebook page
- ✓ Book an appointment / leave a secure message from the mobile site
- ✓ One click to call, location based directions and contact forms



Mobile optimised web sites - Features

Client Data capture (financial / mortgage) for existing clients in a protected area so that they can update their information

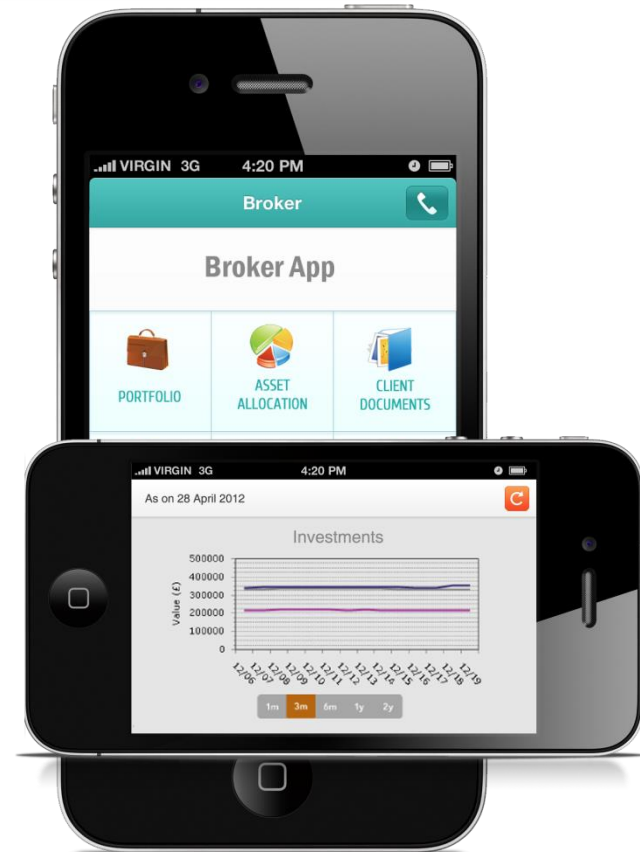
Client Data capture (financial / mortgage) for new clients so that they can enter their information in a secure area

Mobile / Tablet Apps



For advisors who would like to offer premium services to their clients, advanced functions that can help build interactive user engagement delivered through native apps on iPhone, iPad and Android phones, tablets.

- ✓ Manage the customers who have access to the application through **Money Advice +CRM**
- ✓ Deliver policy details including fund values, and other product information to clients in an interactive manner.
- ✓ Secure communication of client information
- ✓ Allow customers update or create their own fact find information, which automatically updates **Money Advice +CRM**
- ✓ Protection quotes and all other features of mobile web site




Zurich Home Insurance Quotes



Get quotations and place business online

- Zurich General Insurance have established a major bridge between their in-house quotation, underwriting and administration systems with **Money Advice** enabling **Money Advice** clients sell the Zurich quality house insurance product.
- This facility provides Brokers with competitive quotation, proposal and policy documents on line and in real time.
- This facility is designed to give Financial Brokers a quality product, a new source of income, and an enhanced relationship with their clients.
- Brokers have placed substantial household business through lenders and can now easily recover this.



The screenshot shows a web-based form for Zurich Home Insurance. The form is divided into several sections:

- Navigation:** Tabs for "Home Insurance Proposal", "Property Details", "Cover Details", and "Risks".
- Personal Details:**
 - Title: Mr
 - Forename: [Text Field]
 - Surname: [Text Field]
 - Date Of Birth: 1 Jan 1970
 - Occupation: [Text Field]
 - Postal Address: [Text Field]
 - County: [Text Field]
 - Town: [Text Field]
 - Risk County Code: [Text Field]
 - Risk Area Code: [Text Field]
- Quote Information:**
 - Date Of Birth: 1 Jan 1970
 - Risk County: [Text Field]
 - Risk Area: [Text Field]
 - Home Type: [Text Field]
 - No. of Bedrooms: [Text Field]
 - Year Property Built: [Text Field]
 - Heating System: [Text Field]
 - Home Use: [Text Field]
 - No. of Occupants: [Text Field]
 - Was the Property previously insured: No
 - Years Without a Claim: [Text Field]
 - Burglar Alarm: [Text Field]
 - Do any occupants Smoke: No
 - Is the property a Listed Building: No
- Cover Required:**
 - Please state how much your house and contents are to be insured for:
 - Buildings Sum Insured: [Text Field]
 - Contents Sum Insured: [Text Field]
 - Accidental Damage Cover: No
 - Voluntary Excess: EUR0250 Standard

Buttons at the bottom: Clear, Assumptions, Get Quote.



Document Management

Money Advice +CRM provides a capacity to generate all the letter template a broker's office would use.

- ✓ Users are additionally able to add/manage their own letter and e-mail templates.
- ✓ Users are able to automatically brand all such communications with their own signatures/logos as well.
- ✓ Letters, emails and other documents generated on **Money Advice +CRM** are automatically saved to the system. Inward emails (from Outlook) and other documents can be easily saved to the system and attached to the client or/and the client policy/product. This functionality allows all communication with a client to be recorded with ease, creating an invaluable record and save you substantial time managing your clients' data and documents.

Report Name	Report Type	Created By	Created On
report	Financial Statement Full Report	Ivan Grisdale	04/04/2014
Needs Analysis Report	Needs Analysis Report	Ivan Grisdale	10/02/2014
test	Monthly Household Expenditure Report	Ivan Grisdale	28/01/2014
test	Financial Statement Full Report	Ivan Grisdale	28/01/2014
t	Financial Statement Full Report	Ivan Grisdale	02/01/2014
test	Financial Statement Full Report	Ivan Grisdale	10/12/2013

Report Name	Report Type	Created By	Created On
report	Needs Analysis Report	Ivan Grisdale	10/02/2014

User Guide

Manage Documents

- ★ Saved Documents
- ★ Letters
- ★ Scanned Documents
- ★ Emails

Letters

Name: Date From: <dd/MM/yyyy> 15 Added By: All
Type: Date To: <dd/MM/yyyy> 15 Search Clear

Refresh

Inbox - Microsoft Outlook

File Edit View Go Tools Actions Help

New Reply Reply to All Forward Send/Receive Search address books

Open Norton AntiSpam This is Spam This is not Spam Empty Spam Folder

Mail

Favorite Folders

- Inbox
- Unread Mail
- Sent Items

Mail Folders

- All Mail Items
- Personal Folders
 - Deleted Items
 - Drafts
 - Inbox
 - Junk E-mail
 - Outbox
 - RSS Feeds
 - Sent Items
 - Search Folders

Inbox

Search Inbox

Arranged By: Date Newest on top

Older

Microsoft Office Outlook 04/08/2012

Microsoft Office Outlook Test Message

Microsoft Office Outlook

Microsoft Office Outlook

Sent: None

To: ivan@mortgagevision.co.uk

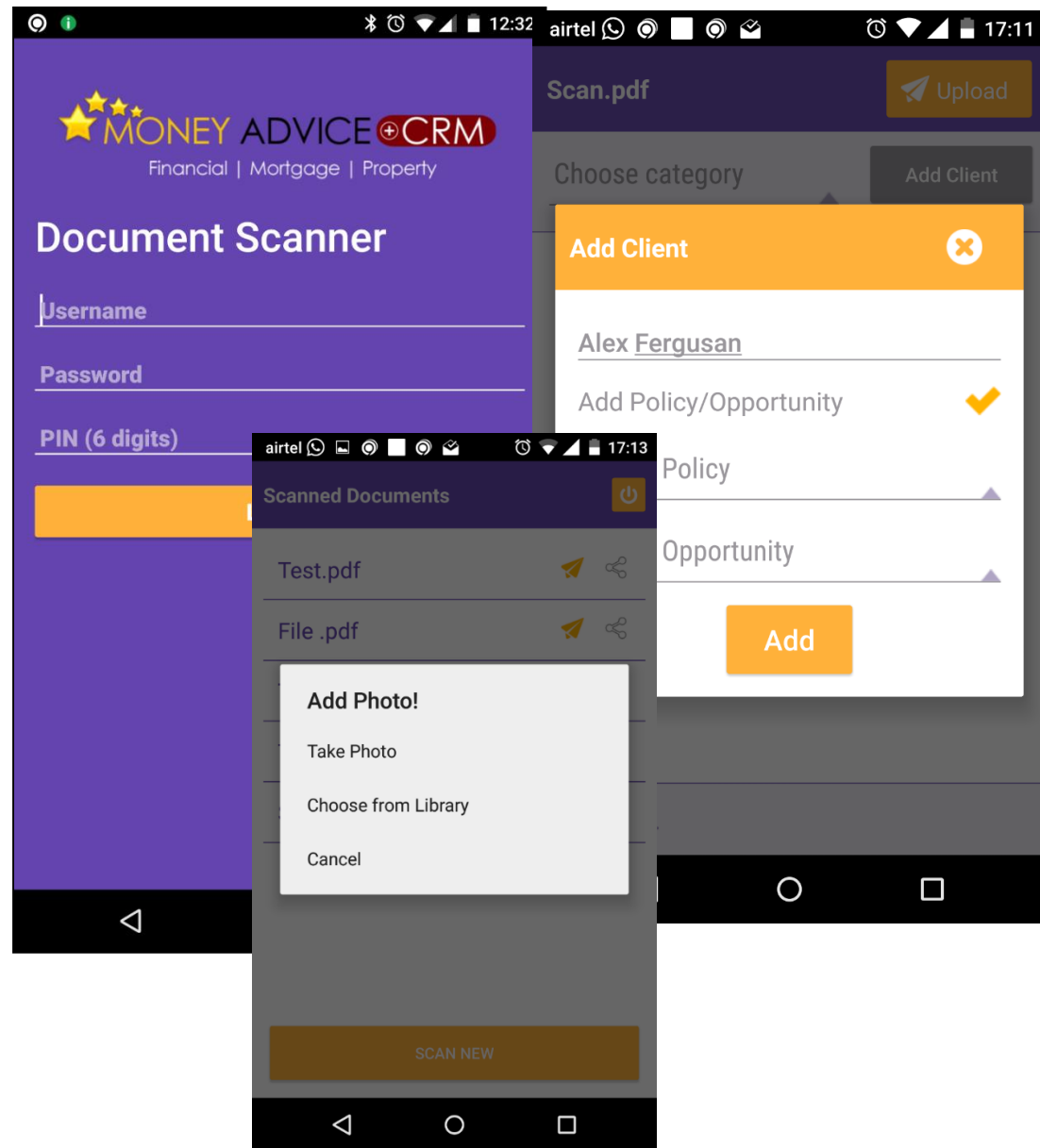
This is an e-mail message sent from Microsoft Office Outlook while testing the system.



Document Scanner App

INTEGRATED WITH CAMSCANNER APP,
THIS MOBILE APP PROVIDES A WAY FOR
THE USERS TO SCAN IMPORTANT
DOCUMENTS USING THEIR PHONE AND
SAVE THEM TO THE CLIENT RECORD IN
MONEY ADVICE

- ✓ The **Camscanner** app provides options to enhance the scanned image.
- ✓ Option to scan multiple pages and create a single PDF document of all the scanned images.
- ✓ Users are able to search the client bank in **Money Advice + CRM** and associate the documents to a particular client / policy / opportunity.
- ✓ The PDF of the scanned images created can also be shared using email.





Financial Planner (Cash Flow)

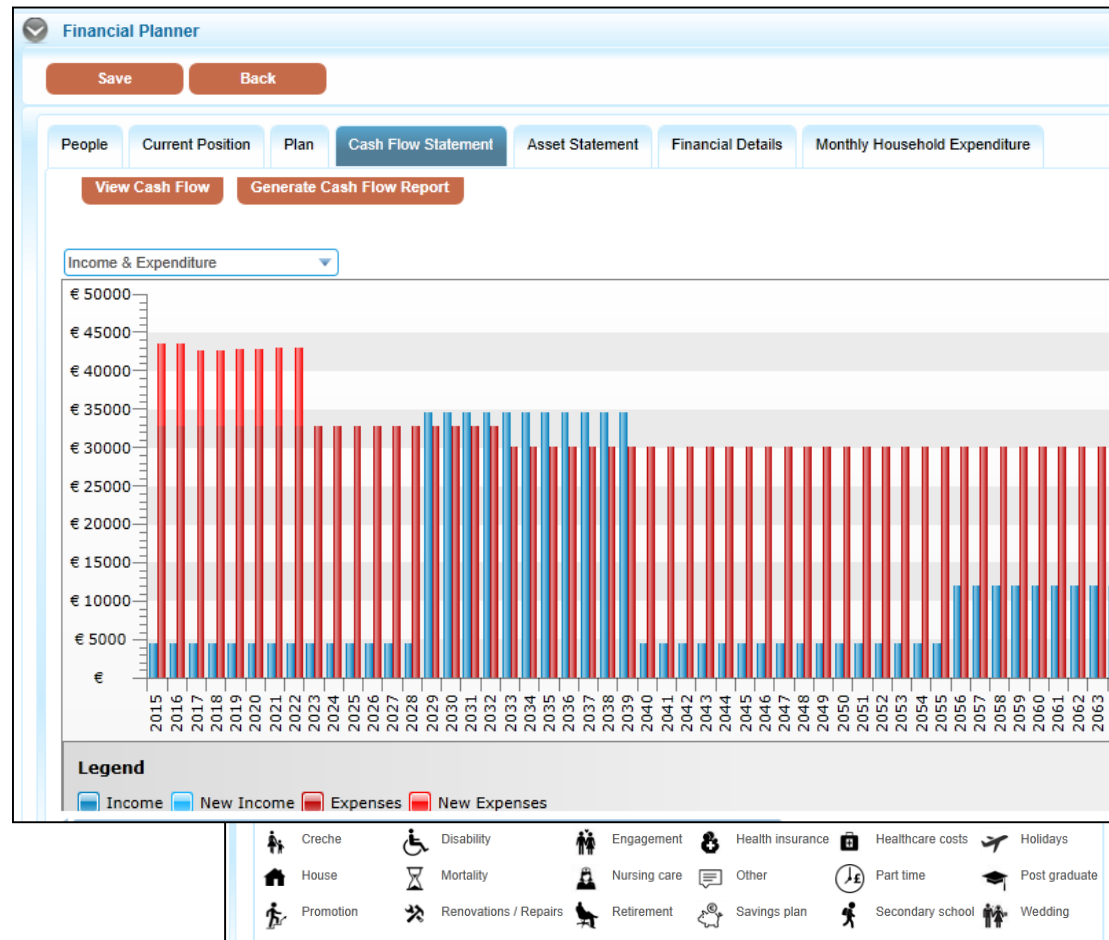


Cash Flow Projections and Financial Planning

The Client Financial Cash Flow Planner can also be completed within **Money Advice +CRM** by the advisor using a unique wizard reducing the time taken to enter client data.

The tool lets the user drag and drop various life time events onto the life time line of the client and calculate the savings required to meet the lifestyle expenses.

These expenses are then plotted into a client cash flow projections report to show the income, expenditure and balance sheet. A detailed asset, liability and net asset worth can also be generated from the tool. The tool will be improved further to include projections for “What-if” scenarios.





Text Messages

With Advanced Search users can drill down to specific clients for SMS merges & marketing

Advanced Search

Client Name: john naas Sex: All Email Address: Mobile: Address 1: County: Town/City: Birth Month: All Age From: Age To: Risk Attitude: All Civil Status: All Date of Birth From: <dd/MM/yyyy> 15 Date of Birth To: <dd/MM/yyyy> 15 Occupation: Investment Knowledge: All Income From: Income To: No. Of Live Products: Employment Status: All No. of Children: Source Of Business: Client 2: Smoker: All Client Type: All Status: All Employer: Premium Review: All Client Owner: All Client Consultant: All Assigned To: All Client Revenue: All Created Date From: <dd/MM/yyyy> 15 Created Date To: <dd/MM/yyyy> 15 **Search** **Clear** **Saved Search**

Email Merge **SMS Merge** **Mail Merge** **Export to Excel** **Create Client** **Merge Clients** **Assign To** **Save Search** Total Records: 3

	First Name	Surname	Date of Birth	Email	Mobile	Address 1	Address 2	Town/City
<input type="checkbox"/>	John	Naas	26/07/1978			Main St		Naas
<input type="checkbox"/>	John	Naas	20/09/1978		087 67890	Main St		Naas
<input type="checkbox"/>	John	Naas	01/10/1970	sean@ambit.ie		Main St		Naas

As professional advisors we all know the importance of maintaining regular contacts with our customers from a best practice point of view and ensuring that we treat our customers fairly.

Our software records individual customer contact preference information, a pre-requisite to ensure you have client permission to contact them for future marketing and reviews.

Money Advice +CRM enables advisors extensively mine their database at a client and policy level. It provides a comprehensive range of text messaging tools including text messaging merge templates. Crucially the software logs and records all these communications, even mass communications.

The software also provides you with an option to receive the text message replies from the clients to a designated group email account so that the emails can be indexed against the client record.

SMS Window

Sender: 0866044440 County code: +353 (IRE)

Mobile number:

Client name	Number
John Naas	0876789090 ✓

Page 1 of 1

Content: Template: Merge fields: **Insert**

Text message

Total credits : 797

Send **Preview** **Cancel**



Fund Focus Integration



Portfolio modelling and analysis tools

Fund Focus is a new fund management tool developed by Longboat Analytics (formerly MoneyMate) which is being made available free to non corporate brokers. To get access credentials please log on to <http://longboatanalytics.com/#home/signup/brokers>

Customers of **Money Advice**, who also have access to **Fund Focus**, can upload client model portfolios directly into Fund Focus where users can analyse the portfolio's overall risk and performance. The integration lets the user select a mix of funds and provide the weightage for the funds and then create various portfolio mixes and analyse their suitability in terms of the overall risk and performance. The portfolios are saved in both **Money Advice** under the client file and also in **Fund Focus** for access when needed.

FUND FOCUS | Remo Jansen | Admin

Home | Performance | Risk | Model Portfolio

Home

Tip! Your favourite funds/indices/currencies/portfolios are displayed here. Click on the ★ in the reports to flag a fund as a favourite

★ My Favourites | ■ My Portfolios | ■ My Reports

■ My Portfolios | ■ My MoneyAdvice Portfolios

Show 25 entries

Name	Description
TEST 18/06/2015 17.0	Long track record of excellent returns. Varying combinations of assets offers greater diversity and excellent growth potential. The Balanced Managed Fund maintains a balanced spread of assets that offer growth potential together with assets with an appropriate level of security.
TEST 18/06/2015 17.0	
TEST 18/06/2015 17.0	

Showing 1 to 3 of 3 entries

Key Details

Category	Managed Balanced (-65% Equity)	Latest Price	196.20
Currency	EUR	Latest Price Date	18/05/2015
Rating	★★★★★	Risk Profile ESMA	1 2 3 4 5 6 7

Risk Figures

	1 Year	3 Years	5 Years
Standard Deviation (Ann)	9.46	7.70	10.03
Sharpe (Ann)	1.34%	1.60%	0.87%
Sortino Ratio	0.28	0.37	0.18
Downside Deviation	0.87	0.65	0.95
Max Drawdown	-5.67%	-6.46%	-13.61%

Max Drawdown Calendar Year

Year	Drawdown	Year	Drawdown
2014	-4.40%	2009	-11.77%
2013	-7.26%	2008	-34.99%
2012	-5.50%	2007	-15.26%
2011	+13.94%	2006	-8.43%
2010	-8.41%	2005	-3.03%

Vs Funds in Category

From 18/05/2010 to 18/05/2015

Monthly Performance Bar Chart

From 18/05/2014 to 18/05/2015

Lunar Technologies Ltd T/A Money Advice

6 Carmody Street Business Park
Ennis, Co Clare

87, Merrion Square
Dublin 2

Tel: +353 (65) 684 9675

Tel: +353 (1) 558 6757

Support Email: support@moneyadvice.ie

Managing Director

Philip O'Reilly

Sales Email: philip@moneyadvice.ie

Mobile: +(353) 86 604 4448

We hold demonstrations of the software throughout the country on request. We provide regular group demonstrations and workshops. Initial training is provided free. Our help desk is staffed by an experienced team. Mon to Fri 9.00 am to 5.30 pm
Lunch is 12.30 to 1.30 daily.