SmartLink for eMoney

Leverage your client existing data to streamline financial planning

DATASHEET

SmartLink for eMoney, an add-on to Ebix CRM's SmartOffice®, streamlines the process of creating financial plans for each client by autofilling all of the required client information — from simple names and addresses to the most current investment and policy data. Using the eMoney button right on the SmartOffice desktop, you can seamlessly move between the two applications and share data to eliminate redundant data entry, reduce errors, and save you valuable time.

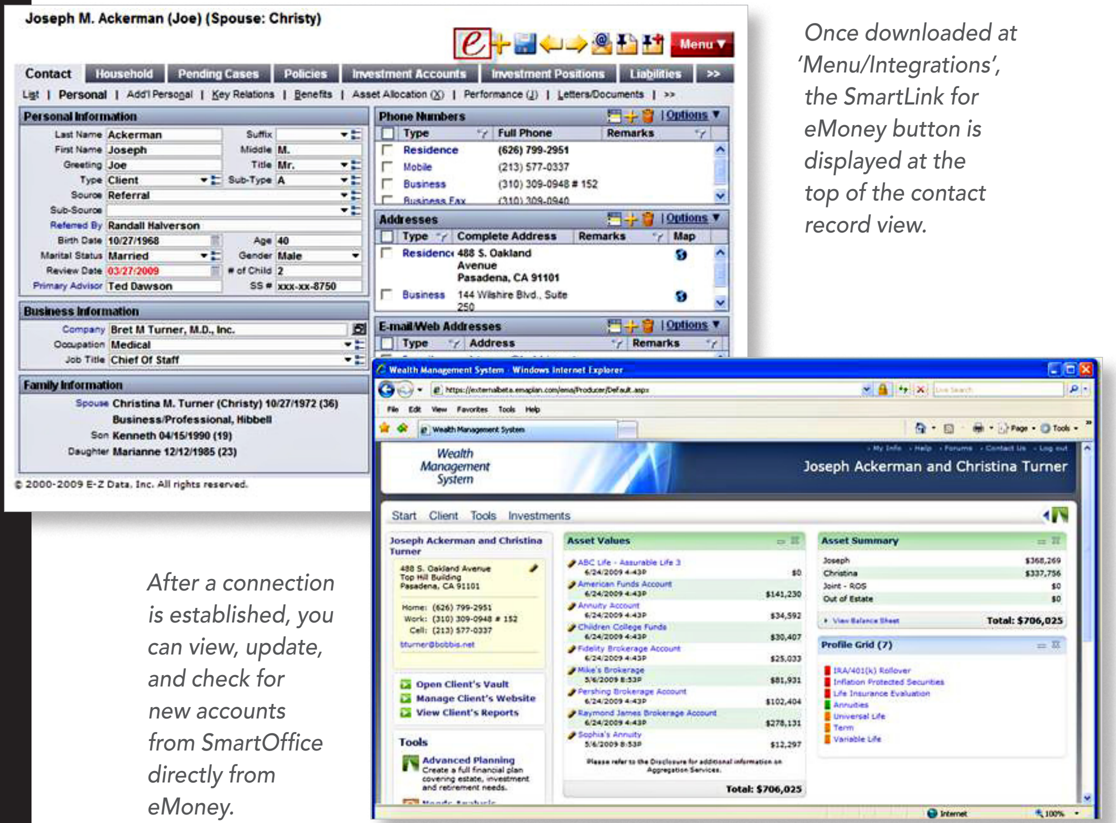
Automate your financial planning processes

Creating financial plans for your clients is one of the most valuable services you offer. But the value you bring to your clients does not lie in the administrative task of filling out forms. SmartLink for eMoney automates this basic requirement of the planning process, eliminating the need to toggle between multiple sites, copy and paste information, and manually verify that the information is correct. Simply click on the eMoney button from SmartOffice to instantly access and leverage the most up-to-date, accurate information. Once in eMoney, you can select which investment and policy data to transfer from the client's SmartOffice record.

- *Kick start the financial planning process*
- *Leverage existing investment and policy data*
- *Reduce the time it takes to create each new plan*
- *Update eMoney client information without re-entering data*

SmartLink for eMoney provides these valuable features:

- **One-click Integration:** *With a single click from the SmartOffice homepage, you can launch the eMoney application and transfer the appropriate demographic data for each client.*
- **Easy to Use:** *No additional training is needed.*
- **Most up-to-date information:** *Data is exported and/or retrieved automatically so you always have the latest information when creating a new financial plan.*
- **User Control:** *Once in eMoney, you control which investment and policy information you want to share between the two applications.*
- **Automated Data Transfers:** *Data is easily and accurately shared between SmartOffice and eMoney to help reduce errors and ensure data integrity.*



Once downloaded at 'Menu/Integrations', the SmartLink for eMoney button is displayed at the top of the contact record view.

After a connection is established, you can view, update, and check for new accounts from SmartOffice directly from eMoney.

Take the next step toward superior service, greater growth, & better business:

- **SmartOffice Professional Edition for Insurance Agents**
- **SmartOffice Premier Edition for Financial Advisors**
- **SmartOffice Premier Edition for Brokerage General Agencies**

To learn more about the SmartOffice solution designed for your business,

call 800-777-9188 or go to www.ebixcrm.com.

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