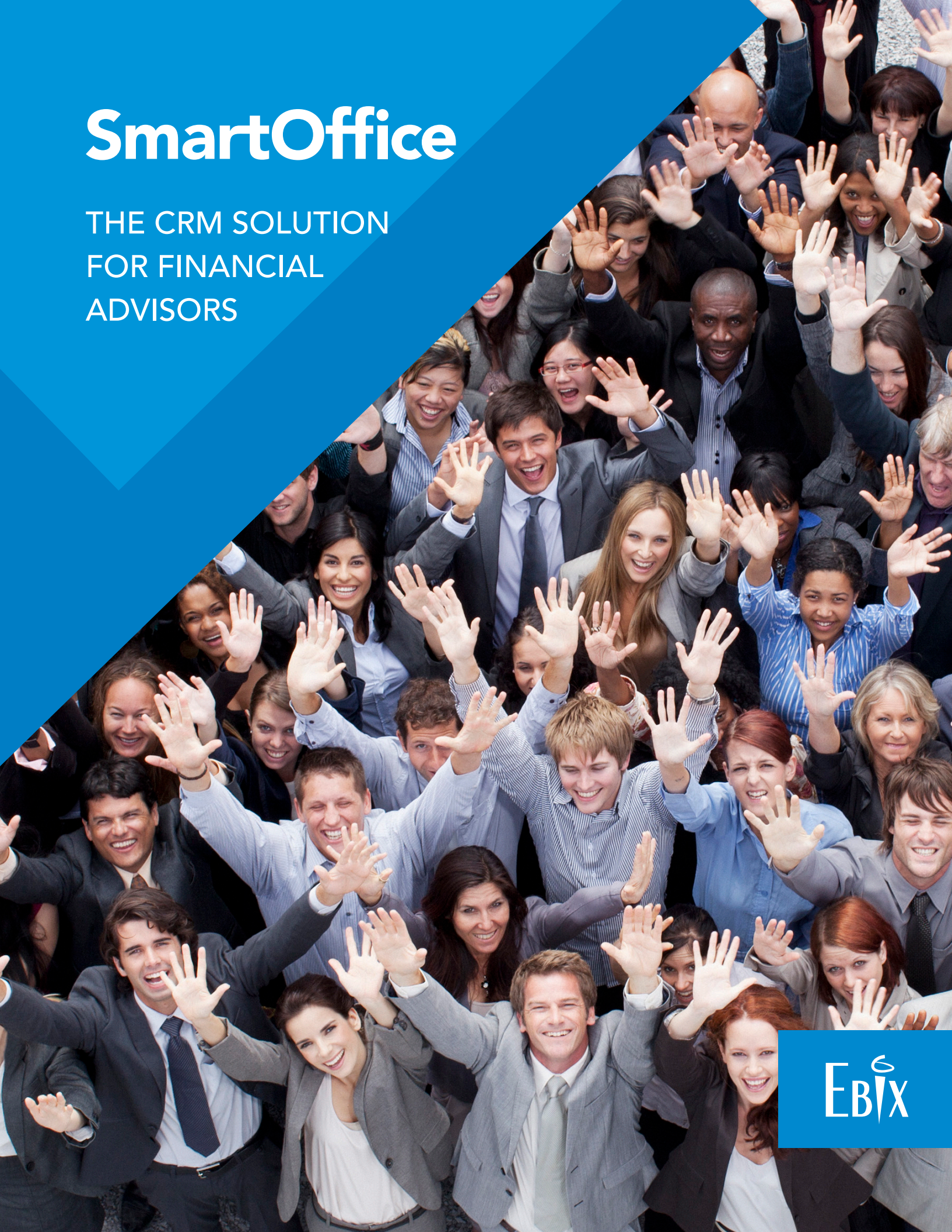
SmartOffice

THE CRM SOLUTION FOR FINANCIAL ADVISORS



EBIX

The CRM Solution for Financial Advisors

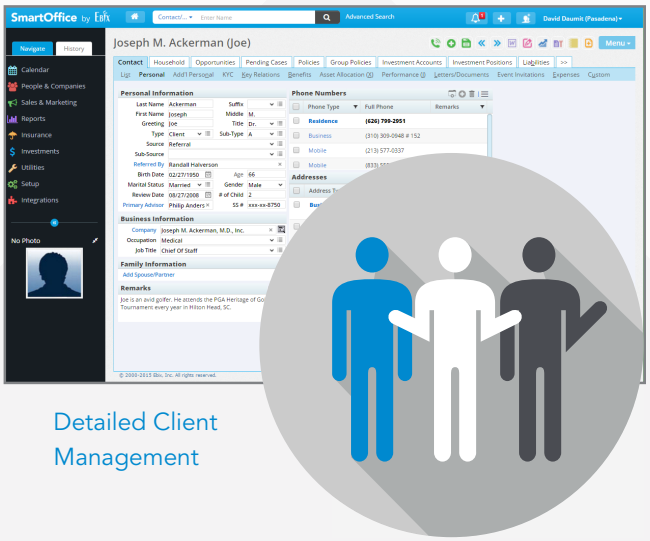
Ebix's SmartOffice helps you achieve your goals by addressing your immediate needs and giving you the flexibility to add features as you grow your business. As one of the industry's most proven solutions, SmartOffice is a flexible, robust platform that delivers tangible business benefits. SmartOffice is the only web-based solution on the market designed from the ground up to help financial services professionals deliver excellent client service, create trusted relationships and generate more revenue.

Core System Features

- **SmartOffice Anywhere** provides REAL browser/device independence and access to your CRM data anywhere, anytime—no plug-ins or extra modules necessary.
- **Client Tracking** helps manage valuable information such as personal, family, business, key relation, and household policy data. An integrated SmartPad tracks each activity and interaction, capturing notes, email text, appointments, phone calls, and more.
- **Activity Tracking & History** helps schedule and track the history of all client/case advisor activities. Log appointments, phone calls, projects, and associated action items. Receive optional prompts for scheduling follow-up actions. Managers can schedule events for their staffs, including assignments, team meetings, and other critical business events. Auto-alerts provide call and appointment reminders.
- **Calendar/Time Management** provides day, week, and month views, group and resource scheduling, and appointment and event planning. Quickly view unfinished and overdue projects; print a daily, weekly, or monthly itinerary; or find a block of time available for a team meeting.
- **Document Tracking** captures and logs both electronic and scanned documents, attaching them to the case or the contact. This feature supports virtually all Windows-compliant document and image file types.
- **Advanced Search** makes it fast and easy to find individuals or businesses by partial name, lead source, phone number, or Social Security number. Search supports a multitude of additional fields including city, state, zip code, policy number, account number, and more.
- **Management Reporting** lets you easily create standard and custom reports that provide visibility into operations. From the amount of selling activity taking place, to the flow of pending cases through the agency, to the underwriting experience and placement ratios with carriers, management can gain an understanding of where to focus their attention.
- **MS Office Integration** allows you to access SmartOffice without ever leaving Office applications like Outlook and Excel.

Sales & Marketing Solutions

- **Opportunity Tracking** helps track and manage every sales opportunity. A detailed Opportunities Dashboard gives management instant visibility into each opportunity to determine the best course of action. Views include opportunity-specific activities and communication, where each opportunity falls within the sales pipeline, and how actuals compare to the sales forecast.
- **Lead Tracking** helps your organization effectively manage and distribute new leads. Measure the effectiveness of marketing campaigns by tracking the follow-up and successful close of new business.
- **Event Tracking** helps you and your staff manage every aspect of event planning—from initial marketing outreach, to follow-up communication, attendee registration, on-site planning, and lead tracking.



Detailed Client Management

Investment Solutions

- **Investment Tracking** helps advisors grow a profitable managed account business. Download financial data from leading data providers at the touch of a button, and then export client accounts and positions to popular sales illustration and needs-analysis programs. The Asset Allocation feature helps manage assets, identifies when a client's assets are out of balance, and alerts advisors.

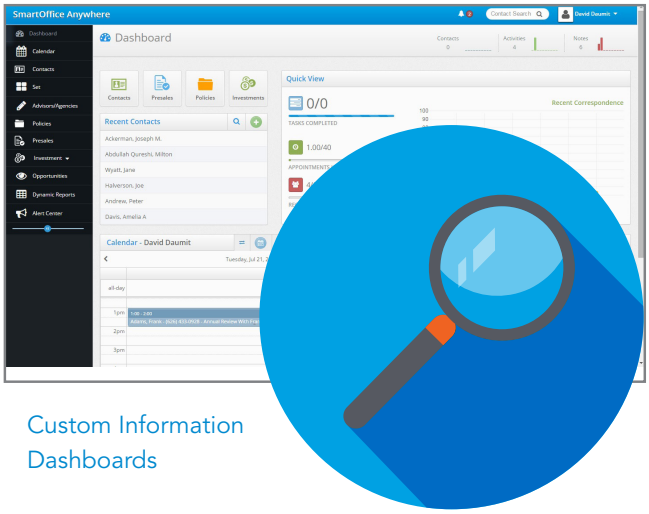
  Downloads/Integrations (partial list)

  - Albridge Web Services
  - Investigo / Broadridge
  - DST
  - National Financial / Fidelity
  - Pershing
  - TD Ameritrade
  - Sterne Agee
  - DAZL
  - Raymond James
  - LPL Branchnet (per Advisor)

- **SmartView for Clients** leverages the power of your web-based SmartOffice solution to publish detailed policy and investment portfolio information to a secure web page, giving clients the information they need to make important decisions—day or night, seven days a week.

Insurance Solutions

- **Policy Tracking** covers all types of policies (including Life, DI, Medical, LTC, Annuity, Group, Auto, Homeowner, and Umbrella) and lets you view policy information globally or by individual, group, or household. You can also track the purchase or sale of subaccount shares for variable life policies.
- **Commission Tracking for Advisors (Lite Version)** helps calculate and track commissions due and paid for each policy sold by the advisor. It also forecasts forecast expected commissions and reconciles payments from carriers.
- **Production Dashboard** provides a consolidated view of production numbers for individual advisors, branch offices, or organizations in a clear, easy-to-understand format. The production numbers are rolled up nightly from the information entered into the SmartCaseManager module. These numbers appear on each advisor's record and can also be included in Dynamic Reports for analysis.



Custom Information Dashboards

- **Pending Case Management** helps you take control of multi-carrier, multi-product new-business processing by leveraging Ebix's DataXchange solution to automatically download carrier status updates directly into the policy data fields. Case managers can accept home office updates automatically or use side-by-side processing to manually validate new data.

  Pending Case Downloads (partial list)

  - AIG
  - Allstate
  - Aviva USA
  - The AXA Group
  - Genworth Financial Group
  - ING Group
  - Legal and General American
  - Lincoln Financial Group
  - Manulife Financial
  - MetLife
  - Nationwide
  - North American
  - Pacific Life
  - Phoenix Companies
  - Protective Life
  - Prudential
  - SBLI
  - Securian
  - Sun Life Financial
  - Transamerica
  - United of Omaha

- **Group Benefit Tracking** helps track group benefits data, giving you the information you need to advise your business clients on which products to add to their employee compensation packages, as well as track key employees to cross-sell individual products.
- **Commission Tracking (Full Version)** helps track and manage commissions to ensure payment from every carrier and payment to every agent. Commission specialists can build contracts and track commissions at user-defined hierarchy levels to identify, report, and resolve unpaid commissions. This feature can also build commission projections to assist with revenue forecasting.

Some of our industry integration partners

Access SmartOffice data anywhere, anytime using the device of your choice. To learn more, call 800.777.9188.

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