ADDITIONAL SERVICES

FOR OUR FINANCIAL BROKER CLIENTS

BROKER WEBSITES

Mobile & Broker Website
PROTECTION QUOTATIONS

Mobile & Broker Website
CLIENT PORTFOLIO

Mobile & Broker Website
CLIENT DATA CAPTURE

Broker Website
MOBILE OPTIMISED

Mobile App
DOCUMENT SCANNER

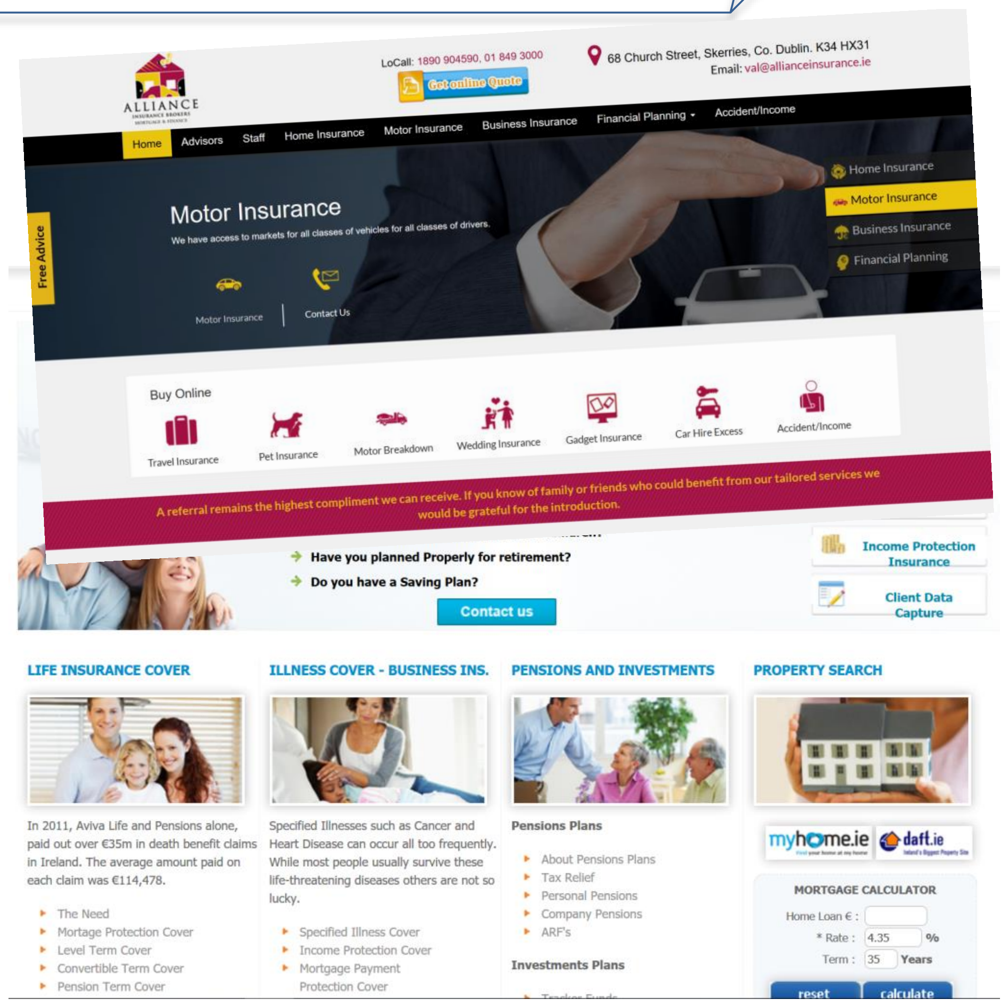
MONEY ADVICE CRM
Financial | Mortgage | Property

Design and Develop Financial Broker web sites

MONEY ADVICE +CRM
Financial I Mortgage I Property

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

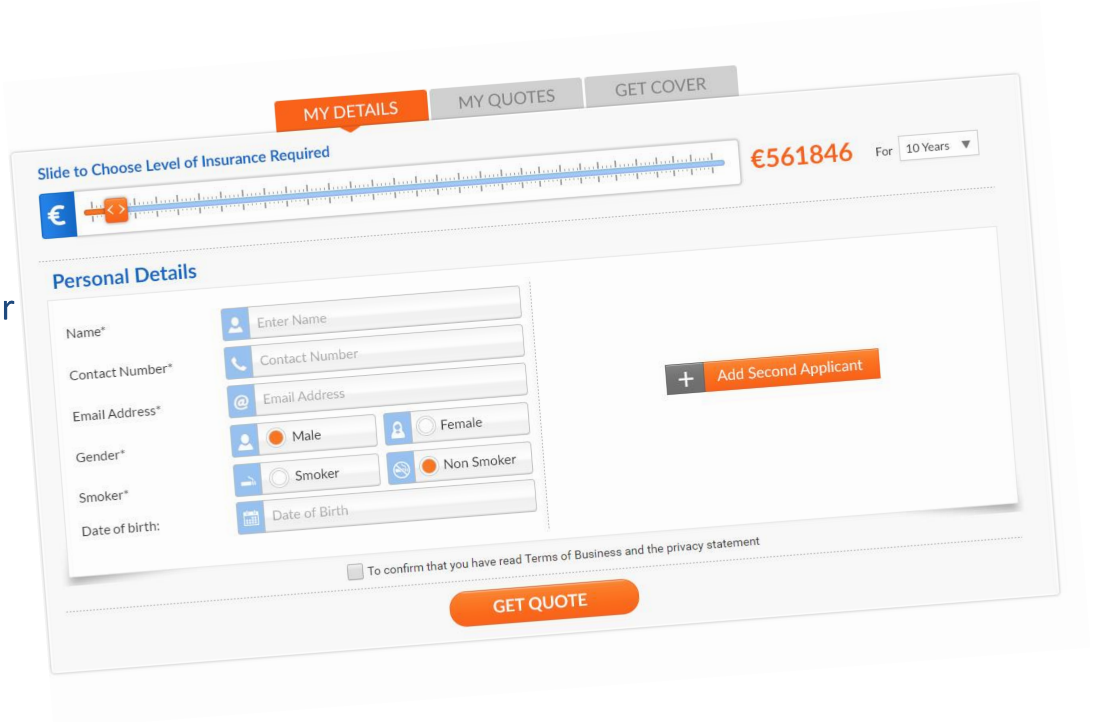
- ✓ An integrated approach with **Money Advice +CRM** from the start where we build and deliver broker websites ensuring maximum results and return on investment from both the new web site and **Money Advice +CRM**.
- ✓ Clear focus on user experience so as to make it easy to use and navigate for your 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.



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



Protection quotations for Financial Broker web sites

MONEY ADVICE CRM
Financial I Mortgage I Property

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

AVIVA | Friends First | Irish Life | NEW IRELAND ASSURANCE | ZURICH | ROYAL LONDON

Apply | Send me the Forms

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

Mortgage Protection Quote

Product Providor	: Irish Life
Product Type	: Mortgage Repayment Protection
Total Repayment Cover	: €100000
Monthly Premium	: €15.15
75% cash Refund	: €136.35

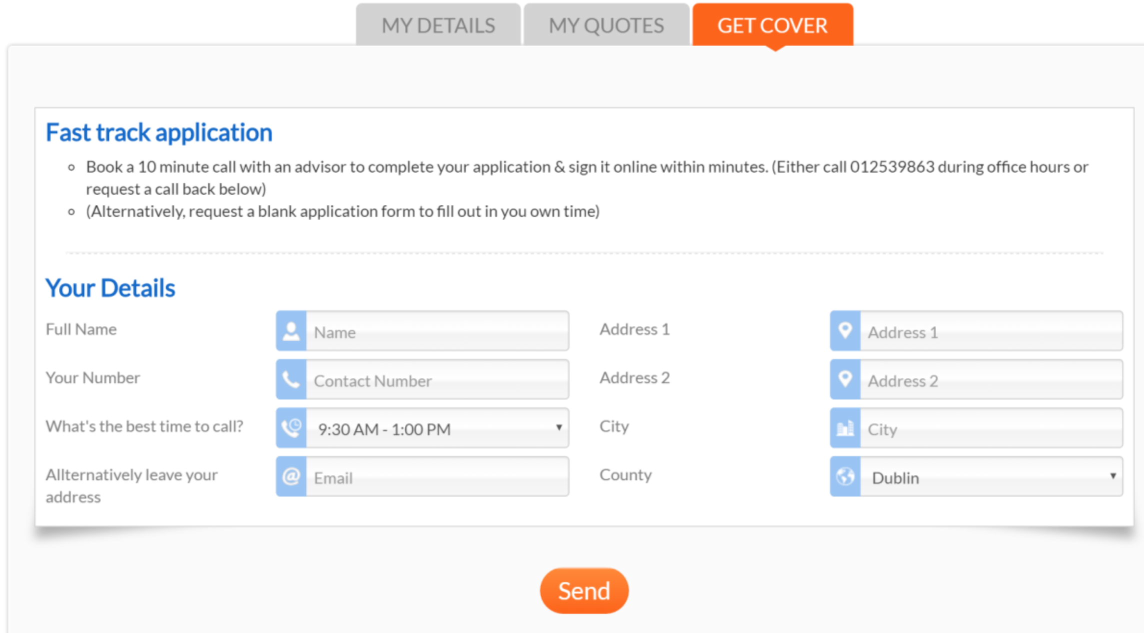
€15.15 Monthly Premium

€136.35 Cash Refund

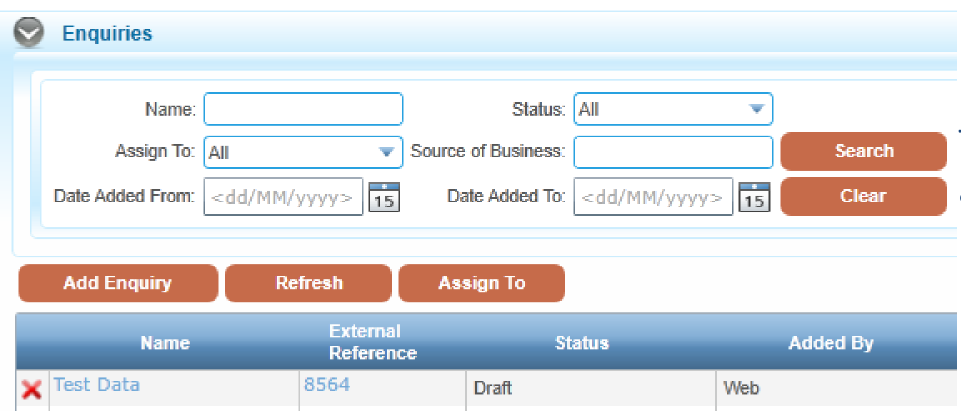
Discounts provided by the brokers can also be accommodated

Protection quotations for Financial Broker web sites

MONEY ADVICE CRM
Financial | Mortgage | Property



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

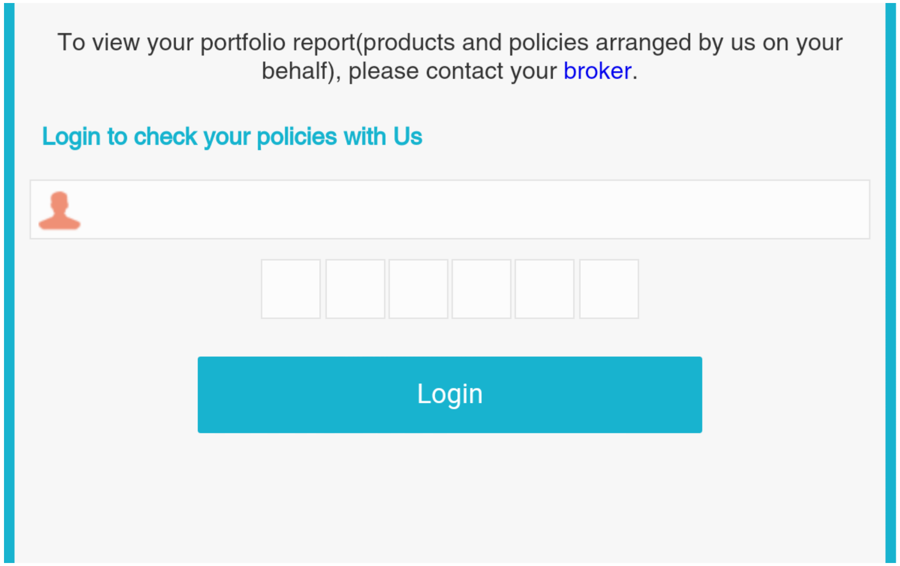


The key details of the lead and quote are pre-populated as a new enquiry

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.



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

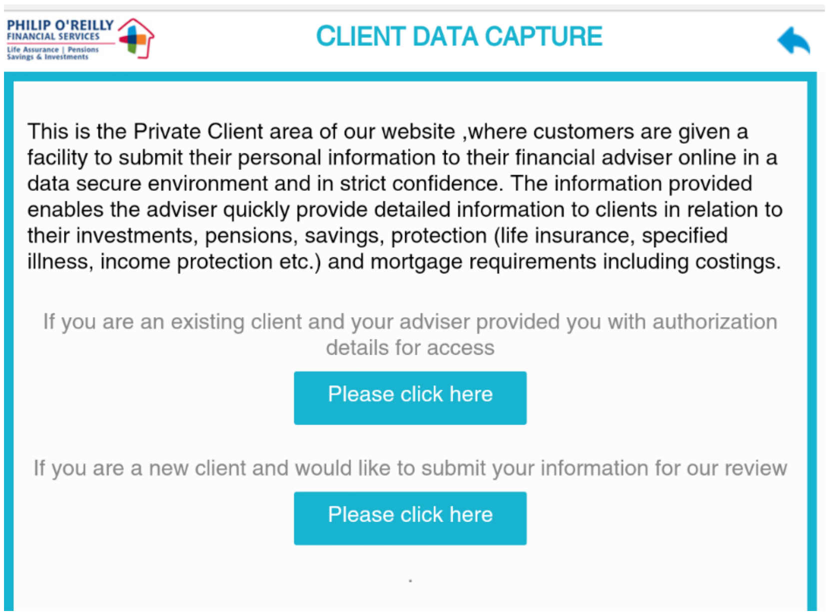
Select Policy Type | Mortgage | Protection | Pension | Investment and Savings

Client data capture for Financial Broker web sites

MONEY ADVICE +CRM
Financial | Mortgage | Property

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**



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.

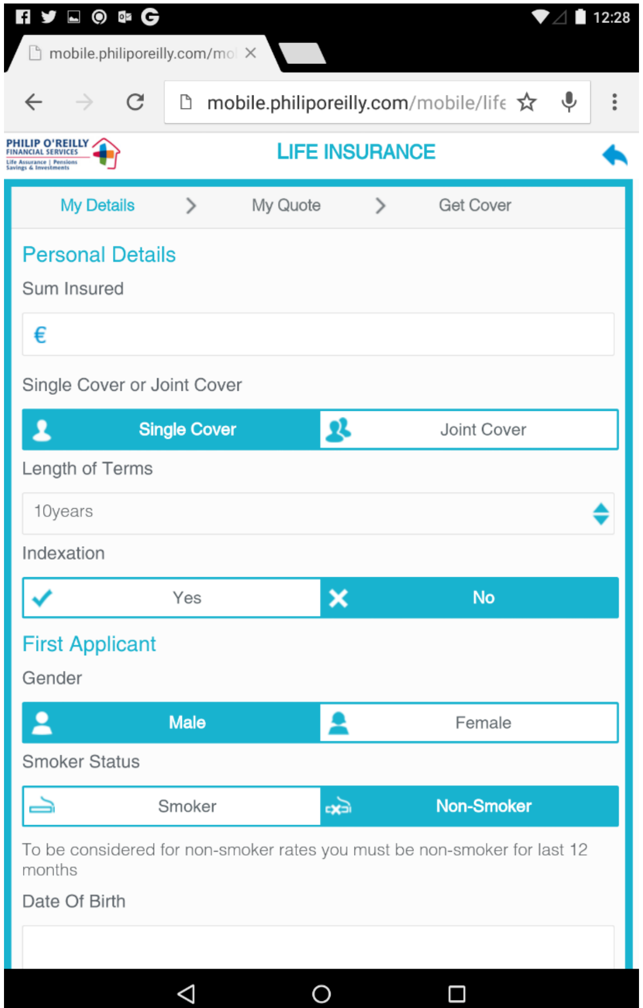
We at **Money Advice** can help you create your own mobile optimised web site incorporating all the features that users to your site would be looking for in one complete package. When a prospect / customer opens your web site from a mobile, they will be redirected to the mobile optimised version.

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

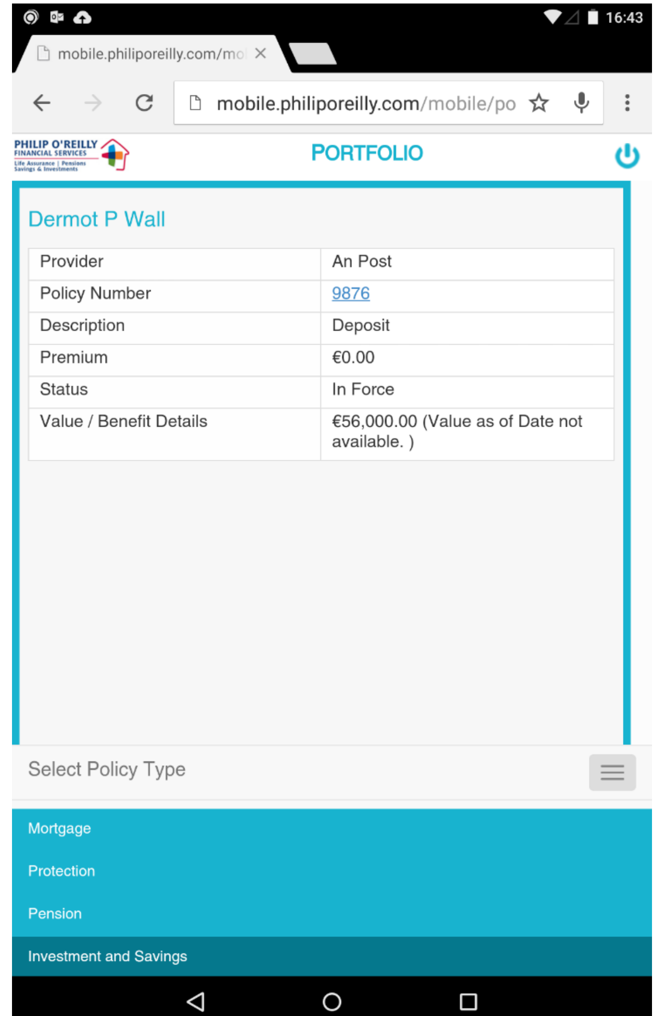
Mobile optimised web sites - Features

MONEY ADVICE CRM
Financial I Mortgage I Property

Provide advice through best price quotes

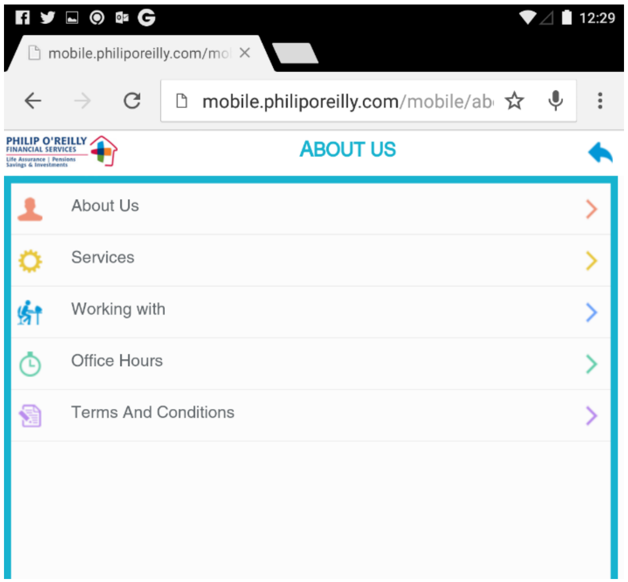


Deliver policy, portfolio information to selected clients in an interactive manner

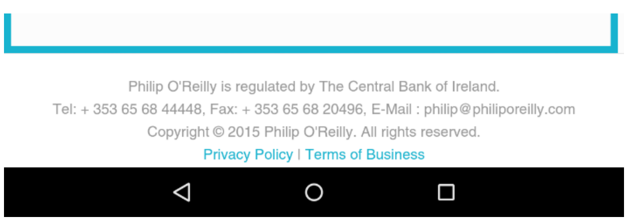


Mobile optimised web sites - Features

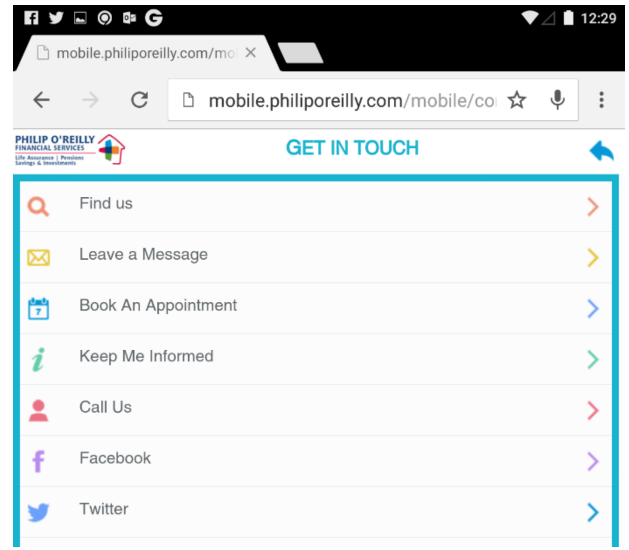
Tell your customers more about your services, news, blogs, and events through mobile optimised content



- ✓ 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



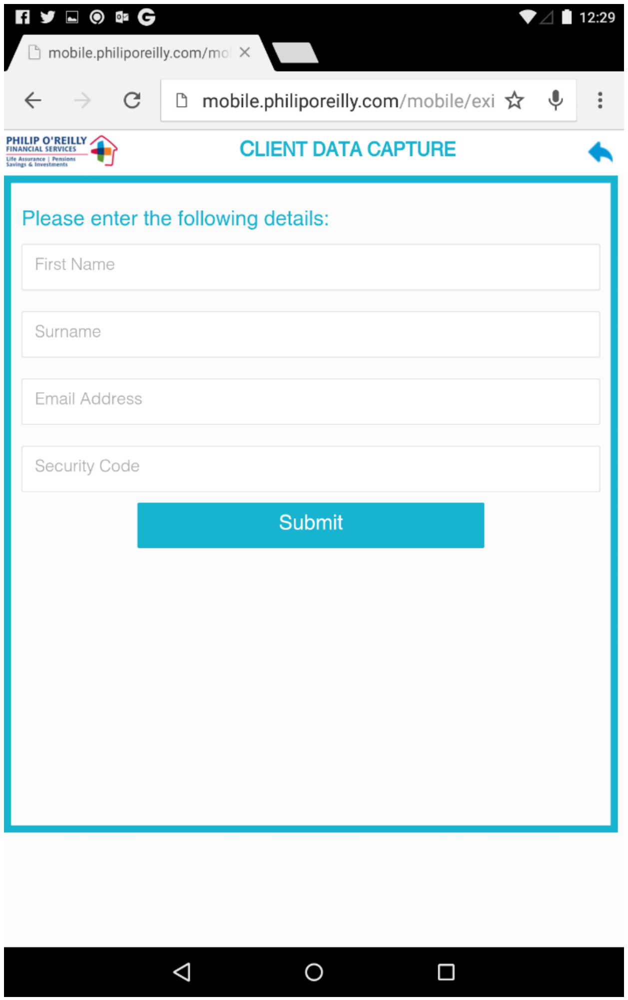
Utilities like :

- ✓ 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

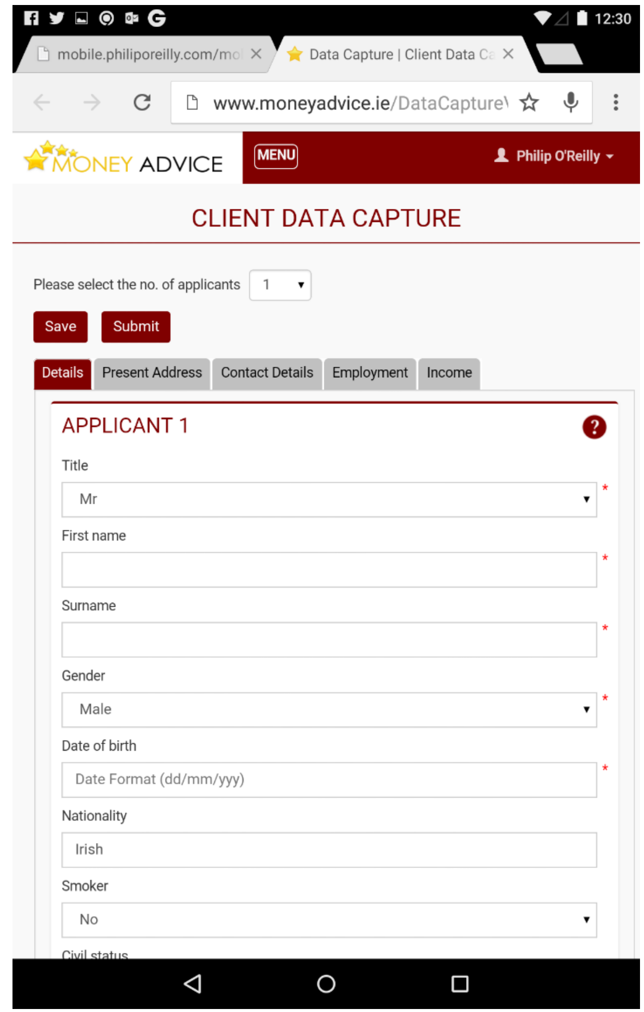
Mobile optimised web sites - Features

MONEY ADVICE CRM
Financial I Mortgage I Property

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



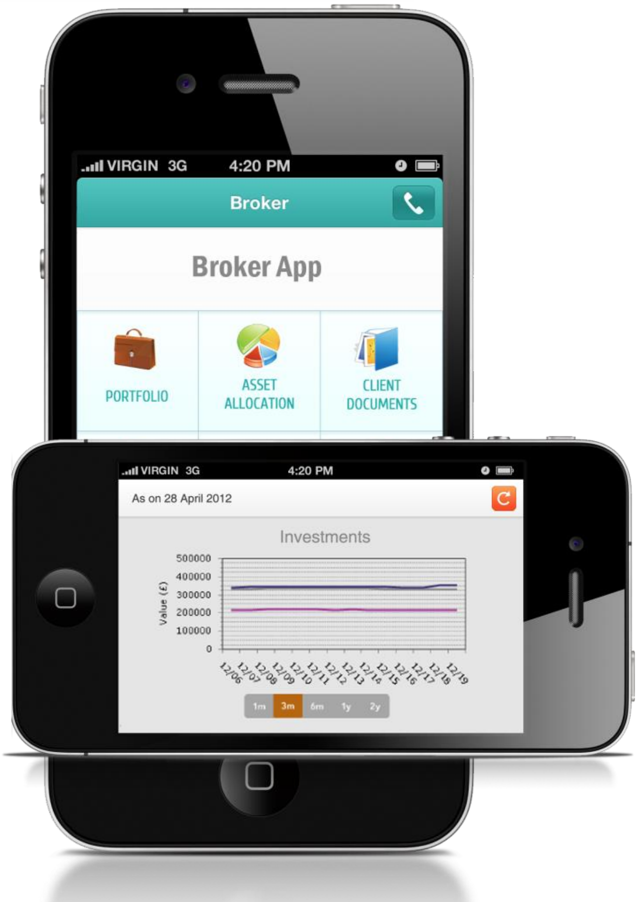
Client Data capture (financial / mortgage) for new clients so that they can enter their information in a secure area



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.

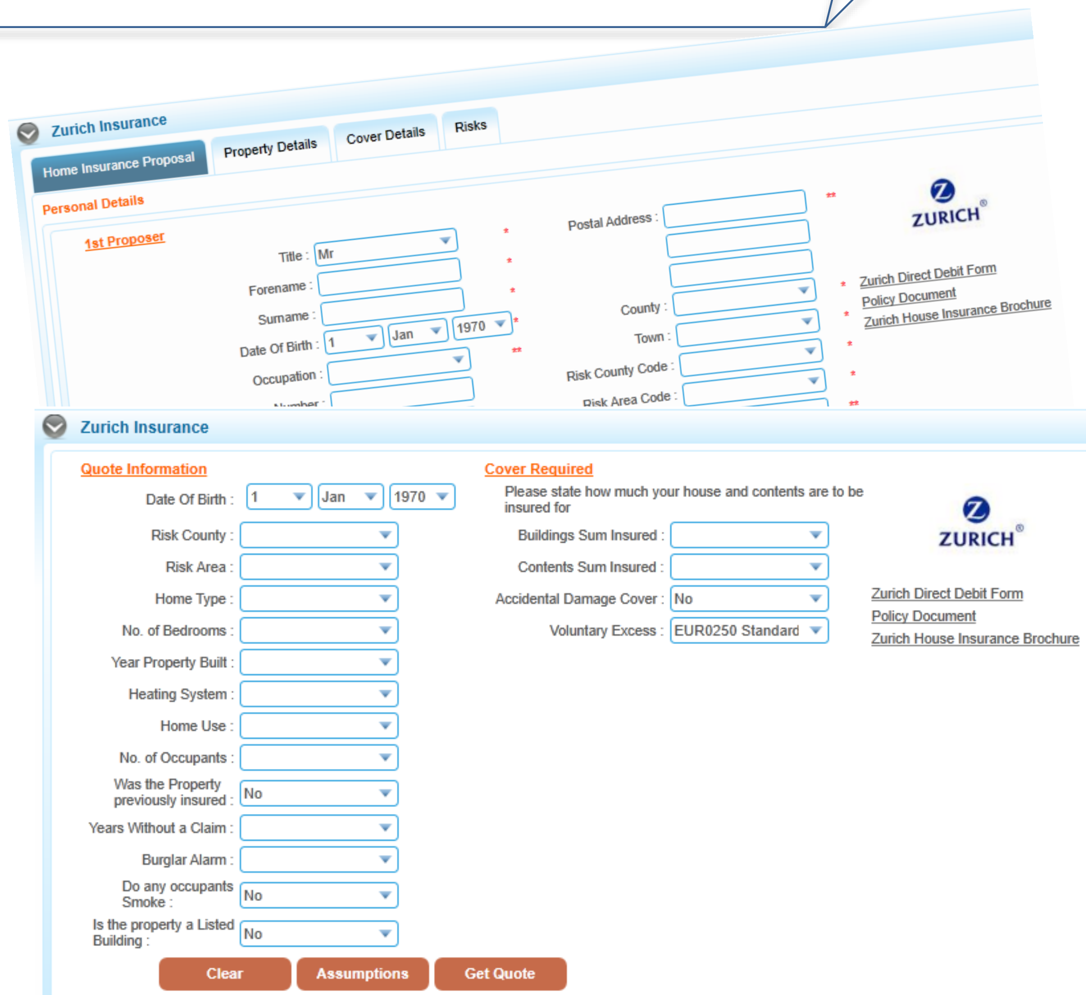
- ✓ Manage the customers who have access to the application through **Money Advice +CRM**
- ✓ Deliver policy details including fund values, and other product information to clients in an interactive manner.
- ✓ Secure communication of client information
- ✓ Allow customers update or create their own 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

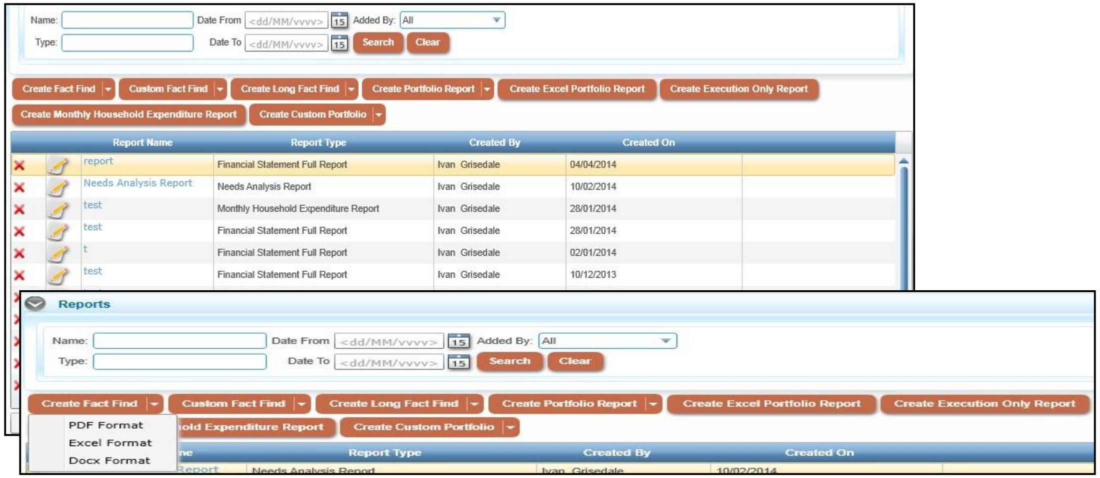
- Zurich General Insurance have established a major bridge between their in-house quotation, underwriting and administration systems with **Money Advice** enabling **Money Advice** clients sell the Zurich quality house insurance product.
- This facility provides Brokers with competitive quotation, proposal 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.

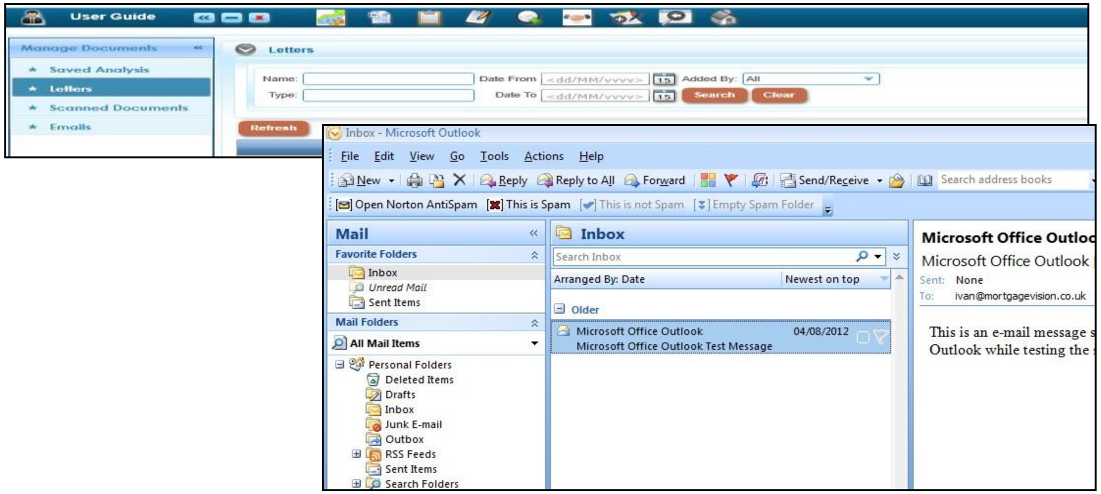


Document Management

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.

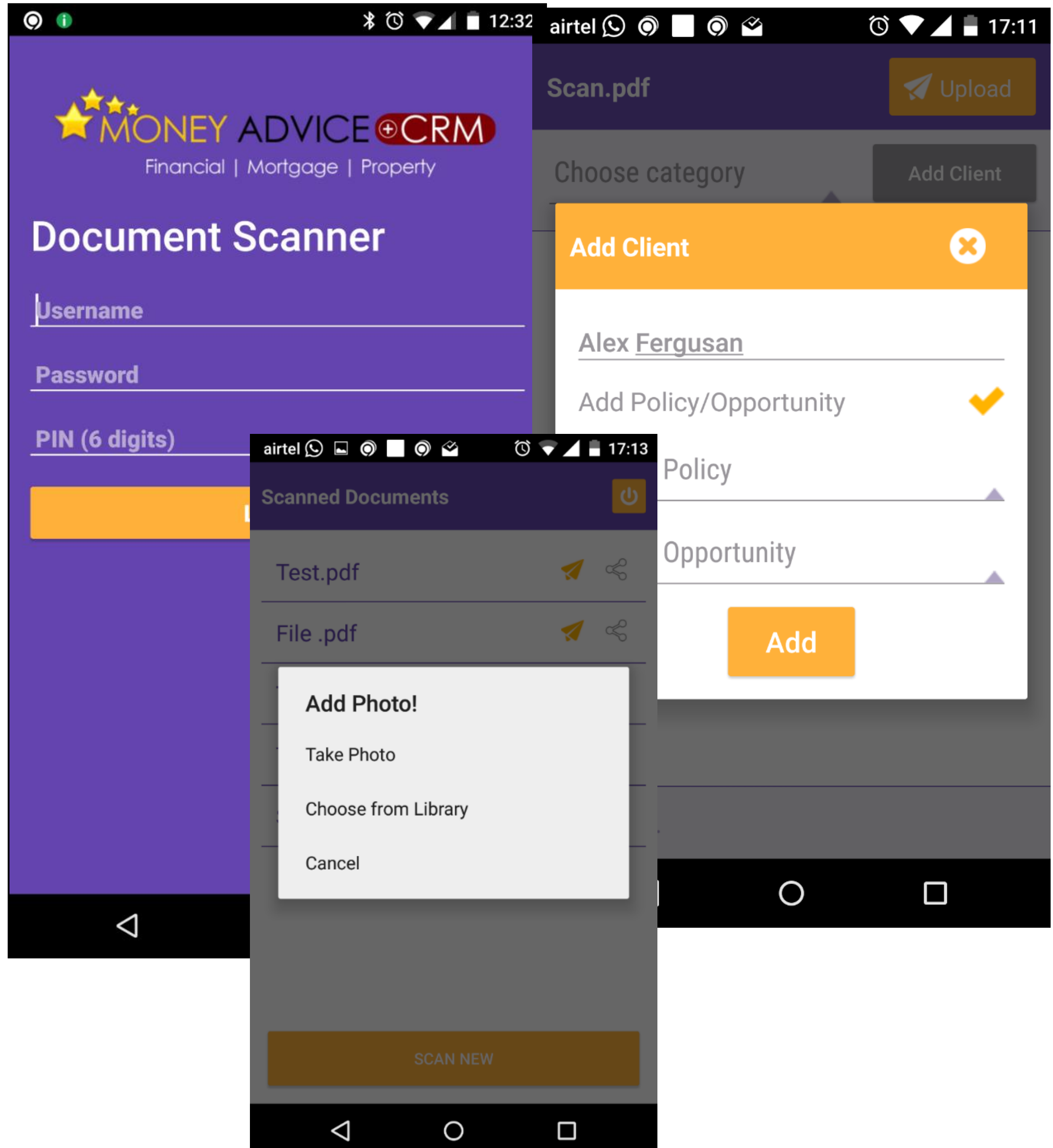




Document Scanner App

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.



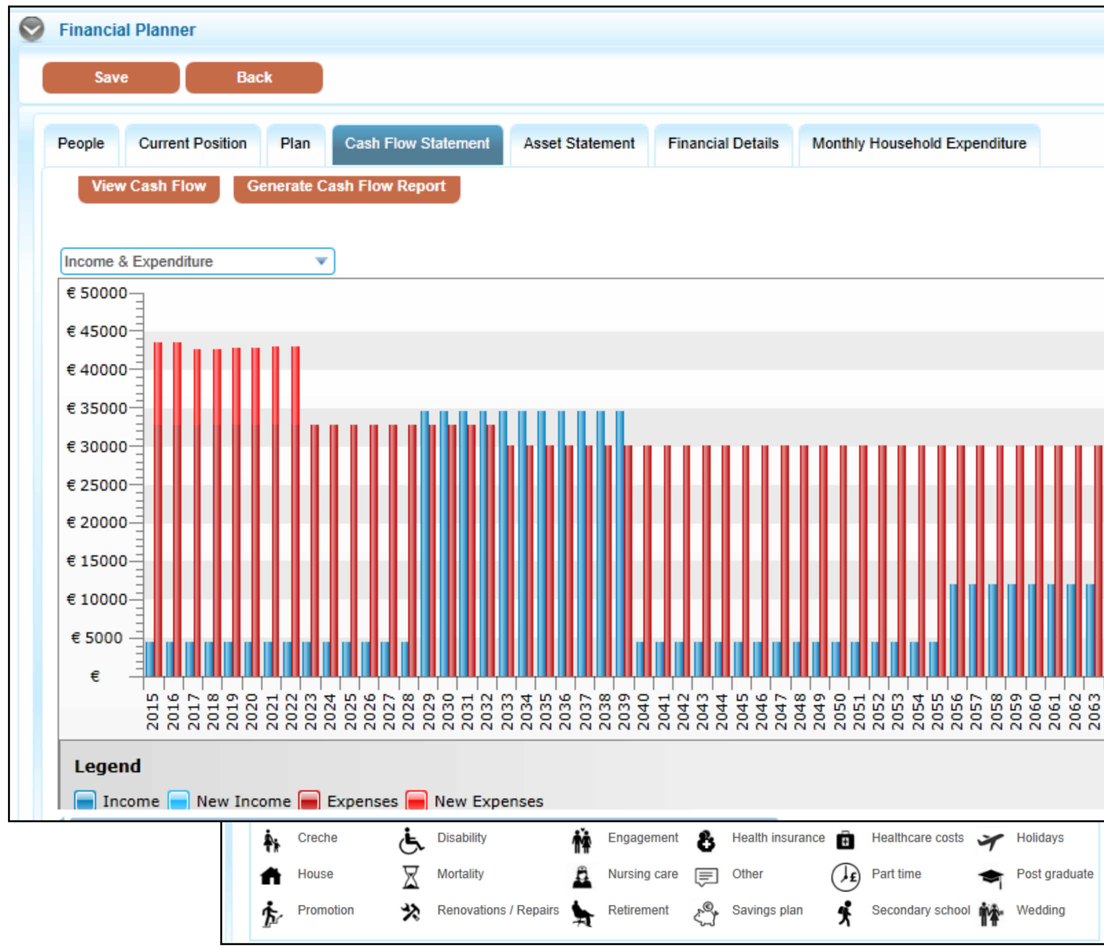
Financial Planner (Cash Flow)

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.

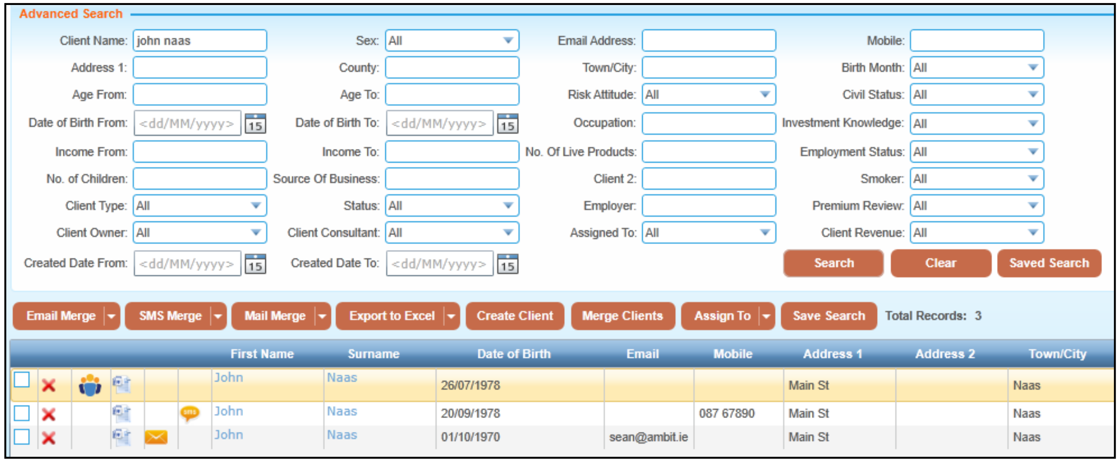
The tool lets the user drag and drop various life time events onto the life time line of the client and calculate the savings required to meet the lifestyle expenses.

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

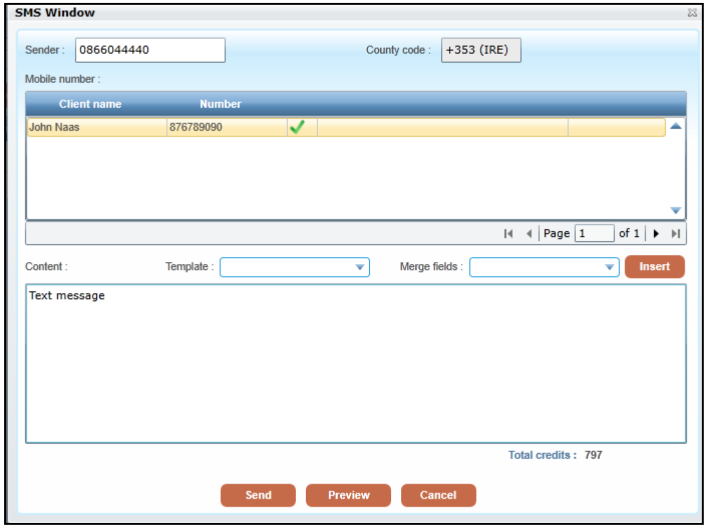


As professional advisors we all know the importance of maintaining regular contacts with our customers from a best practice point of view and ensuring that we treat our customers fairly.

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.



Fund Focus Integration

MONEY ADVICE CRM
Financial | Mortgage | Property

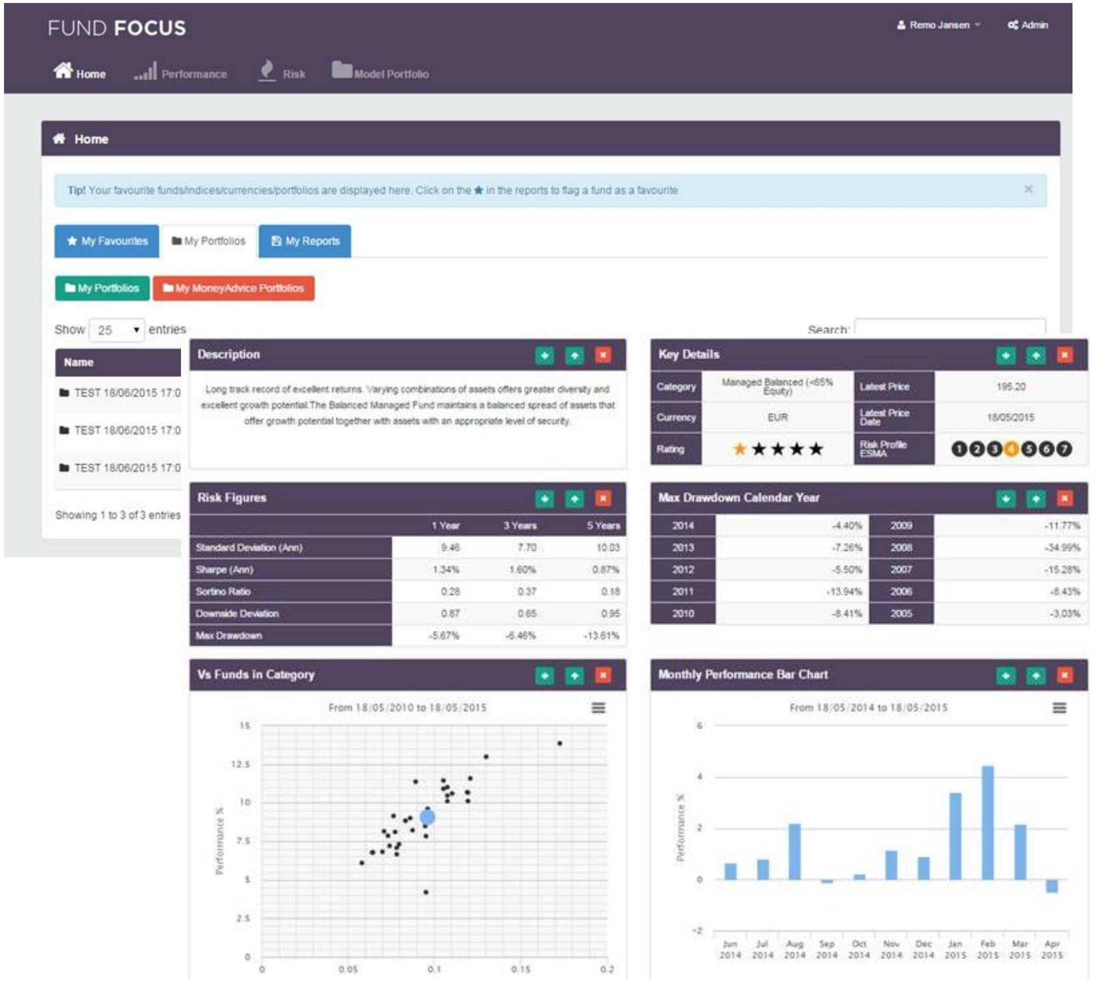
Portfolio modelling and analysis tools

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.



Contact Us

Lunar Technologies Ltd T/A Money Advice

6 Carmody Street Business Park
Ennis, Co Clare

Tel: +353 (65) 684 9675

87, Merrion Square
Dublin 2

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.