

Option 1. Haven Mortgage Application Software- This facilitates completion of mortgage applications and print off of mortgage data capture. On completions applications are submitted on line to Haven Mortgages. The software also facilitates messaging and receipt of loan offer in pdf format.

Cost - Free of Cost

Option 2. Life Protection Quotes And Policy Data Downloads - For 2 years we have been providing life protection quotations and policy data downloads to our customers. In conjunction with PIBA and the Life Offices from 1/3/2014 we can provide these services free to all brokers.

Cost - Free of Cost

Option 2. Money Advice - Money Advice version of the software provides client and policy information, protection quotations, client and policy downloads from insurers, needs analysis, risk profiler, MoneyMate funds research, fact find reports, CPC 2012 compliance, Haven Mortgage Application Software, Home Insurance placing facility, tax and net income calculator, product library, mortgage fact find and calculators including mortgage repayment calculator and Standard Financial Statement reporting.

Cost - €50 pm per 6 users (A saving of €300 pa for those using Best Advice).

Option 3. Money Advice +CRM - Money Advice+CRM is the enterprise version of the software which includes the full CRM (tasks, logs, appointments, letters, emails, reviews, etc), comprehensive management reporting in all areas of activity, compliance management suite, pipeline recording, underwriting tracking, document management, marketing tools incorporating mail and email merges, commissions tracking, reconciliation and reporting.

Cost - €50 pm per user plus the charges for **Money Advice**, e.g. 5 users €300 pm.

Please note that VAT at 23% will be charged in addition to the prices quoted above

Mobile Quotes

€5 per user per month.

Document Management

CRM users of **Money Advice** need a document management system to save external documents to the system.

Money Advice can provide this at a charge of €12 per user per month.

Household Insurance

Through Zurich General we enable brokers quote and place business on line using **Money Advice**. Brokers earn 10% commission for this service. Average premium is to the order of €400.

Training

Training is provided at a cost of €500 per day or €300 per half day.

Please note that VAT at 23% will be charged in addition to the prices quoted above

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