MONEY ADVICE ⊕CRM
Financial | Mortgage | Property
Your Business • See It • Manage It • Expand It
Financial Analysis & Planning
Product Research & Management
Insurance Data Downloads
Compliance Managment
Sales Pipeline Management
Mortgage Advice & Sales
CRM Worlflow & Reviews
Marketing
Document Management
Commission & Fee Management
Mobile & Broker Quotes
Mobile Broker Websites
Training & Helpdesk
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Tel: +353 (65) 684 9675 Email: support@moneyadvice.ie
6 Carmody Street Business Park. Ennis, Co. Clare, Ireland.

Introduction

MONEY ADVICE +CRM
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Philip O Reilly
Managing Director
Money Advice+CRM

Philip O'Reilly an experienced financial planner and chartered surveyor with over 30 years industry experience has been developing advisor software since 1995. The first application "BrokerCRM" was released in 1997.
Software companies cannot deliver solutions unless experienced industry professionals with in-depth domain knowledge are heavily involved in the scoping, specification and on-going development of the ultimate software solution.
Combining the experience from the development of software products with industry knowledge, the software team at Money Advice released the new ***Money Advice+CRM*** platform in Mar 2014. The release included protection quotations and policy downloads from the product providers.

The new software manages financial services and mortgage advisor requirements in the areas of advice, sales, compliance and management.
In building the software we have had a strong focus on CPC 2012 compliance requirements. We have built powerful CRM functionality which includes document management, marketing suite, and pipeline management with fees and commissions management.
The needs analysis tools, cash flow tools and client reports are strong features of the system as are the management reports.
Protection Quotations and policy data downloads from Insurers are provided under the PIBA scheme.

PIBA

Product Providers providing data downloads under the PIBA scheme to ***Money Advice+CRM*** are:
Aviva Life, BCP Asset Management, Caledonian Life, Friends First, Irish Life, New Ireland, Standard Life, Zurich Life
Ongoing work: Aviva Health.

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Money Advice Overview

Money Advice and ***Money Advice+CRM*** are web-based software packages developed to provide Financial Advisors, Financial Planners, Mortgage Advisors, and Finance Consultants, with comprehensive quotations and CRM platforms to empower them to compliantly provide in-depth, quality advice and on-going services to their clients.

In building software solutions for our advisor customers we have also committed to providing full support across all financial, mortgage and lending products and to integrate with the other systems and providers where we can improve on services to our clients.

Our objective is to provide substantial saving in administration time, create revenue opportunities for advisors though marketing capabilities, and provide online links to providers in the areas of life protection products, wealth management, pensions, mortgages, and personal lines general insurance.

Money Advice+CRM firmly believe in supporting our customers and will provide dedicated support while getting established with your new software.

Training and Helpdesk supports are available to all customers

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Money Advice Overview (cont'd)

Existing client banks and customer information can be imported into ***Money Advice+CRM***

Quotations, research reports, fact finds, compliance questionnaires, portfolio reports, client risk profile reports and needs analysis reports are printed on designed forms with the advisors branding prominent. All reports are graphically aligned to the fact-find reports to provide comprehensive client presentations in an attractive format. Fact-find reports are automatically updated from insurer data downloads.

Money Advice is linked to MoneyMate providing fund information and performance data on more than 850 investment funds with supporting Fact Sheets where available.

Mortgage Advisors can avail of the quotations system with up-to-date mortgage rates from MoneyMate. **They can also submit Online applications to Haven Mortgages Limited (AIB Group).** For the lenders who do not provide online services we have provided a generic mortgage application section, which has all the information fields required by any lender.

Additionally the system provides the following mortgage related calculators :

- Repayment (monthly, interest only, and bi-weekly)
- Stamp duty
- Mortgage fact-find and affordability calculator
- Loan consolidation
- Extra monthly payment and/or lump sum
- Mortgage comparison (different rates, terms, amounts)

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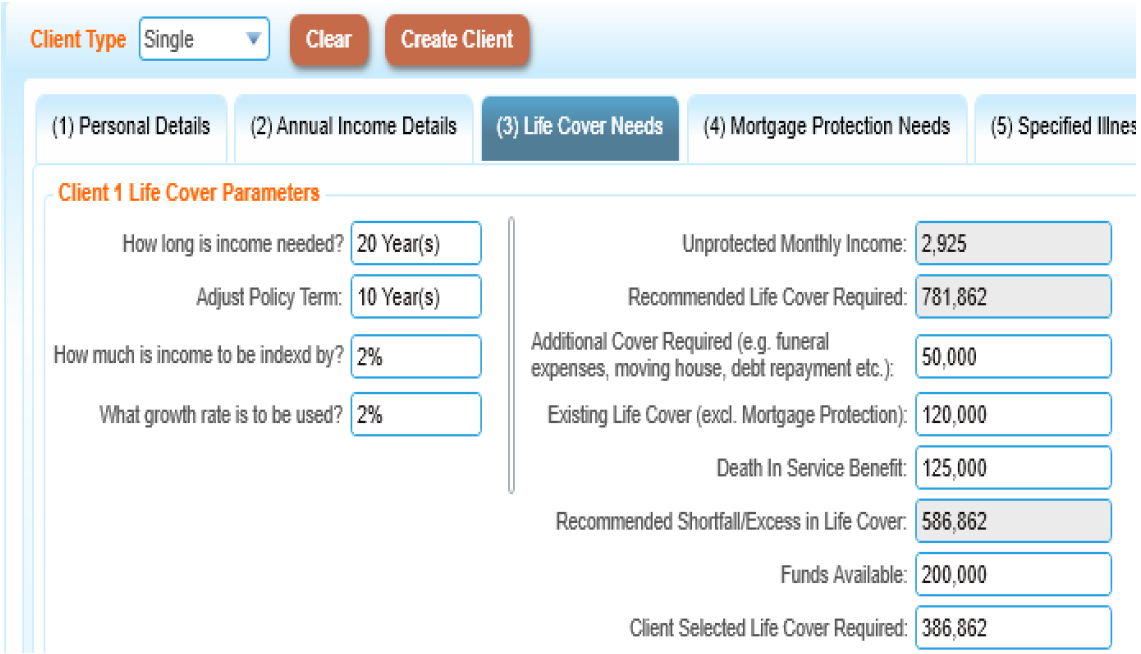
Money Advice Overview (cont'd)

Needs analysis and financial planning calculators are designed to provide financial planning in the areas of :

- Life cover
- Specified illness
- Mortgage protection
- Income protection
- Inheritance tax planning
- Pensions
- Education fees funding
- Savings and lump sum investment
- Borrowings and other commitments
- Cash flow Projections



Compliance tools (CPC 2012) are a strong feature of the system with helpful checklists and prompts.

The system produces compliance reports on a product, advisor, and office wide basis.

The Document Library is a powerful resource in the system.

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Money Advice Overview (cont'd)

Having access to a web based system allows access to client files and systems from anywhere with an internet connection, enabling users track sales activity at an office, individual or a team level.

Money Advice+CRM includes all of the following functionality as standard:

- Comprehensive management reporting
- Compliance management suite incorporating checklists & prompts
- Compliance document templates
- Comprehensive Product Library
- Pipeline recording
- Underwriting tracking
- Document management
- Marketing tool suite including mail, text messaging and e-mail merges
- Commission, fee tracking, reconciliation and reporting
- Lead generation
- Branding facility for documents
- Text messaging, E-mail tracking against client
- Mortgage quotations software
- Mortgage repayment calculators
- Protection quotations software
- Online applications to providers
- Product research and management
- Funds calculator
- Fund pricing by MoneyMate
- Funds profile and ratings
- Client and policy updates from providers
- Pension and investment projected values
- Tax and net income calculator
- Mortgage Fact-Find and affordability calculators
- Mortgage quotations calculator (all lenders)

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Fact Finding

Money Advice+CRM is able to provide you with powerful fact-finding capabilities:

- Comprehensive fact-finds included within the software (a la-carte also available)
- Complete client information capture
- Auto calculators within the software quickly establish client shortfalls and produce personalised client financial reports
- Intuitive affordability calculators provided, which enable the advisor to comply with regulatory requirements including income, assets, liabilities, current & future expenditure calculating monthly affordability both now and in the future

- Ability to easily identify client needs across the full financial spectrum
- Single screen summary view available by client and by product
- Fact-find is easily saved against the clients record and any amendments to the fact-find data are similarly recorded

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Fact Finding

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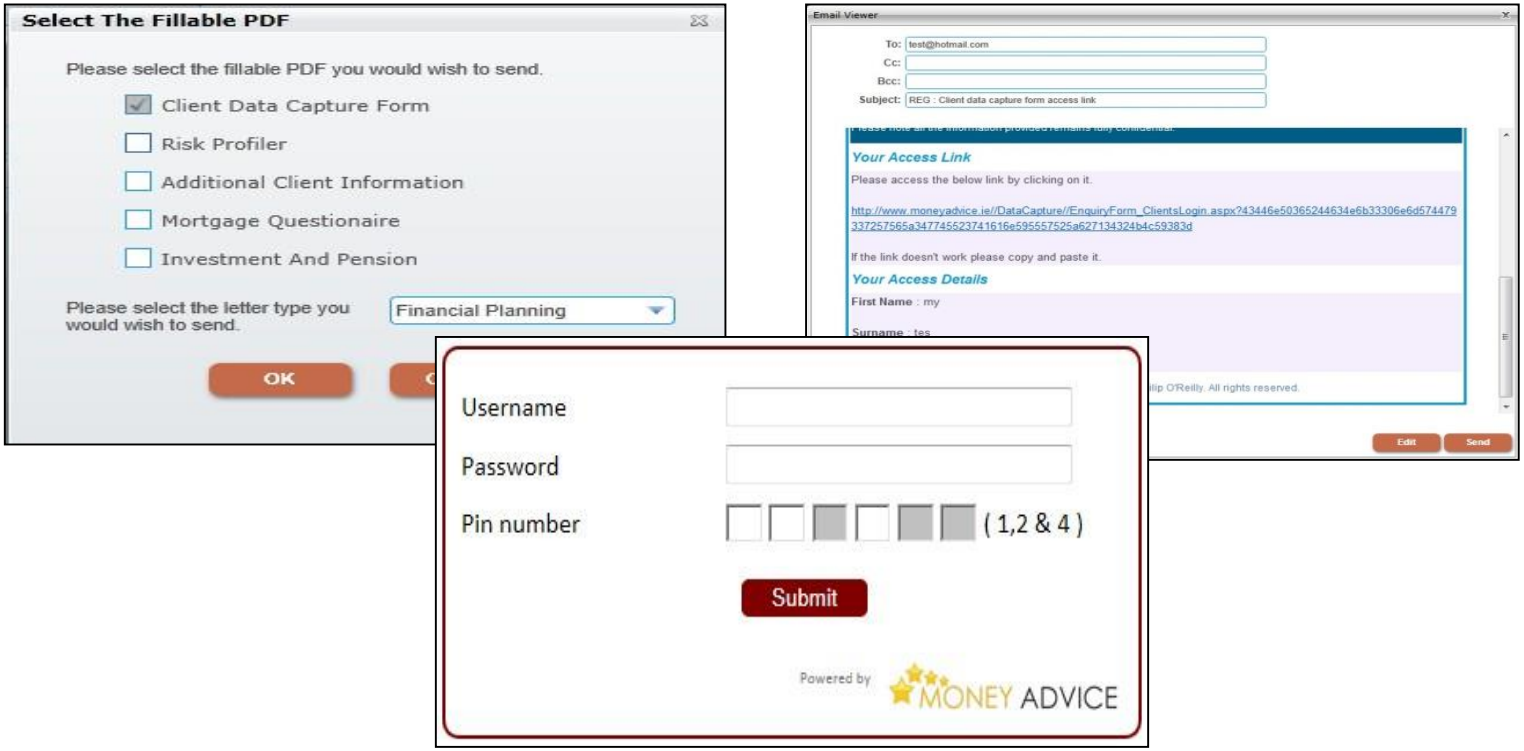
Communicate with Customers Online

Email Data Capture to existing clients or new enquiries to enable them prepare the Fact Find online – Just client name and email address required to send an email web link created by the advisor. Client can log in using a unique PIN & complete the data capture directly and populate Money Advice+CRM automatically. Can also be used to update client information. Risk Profiler and other questionnaires can also be completed online



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Fact Finding

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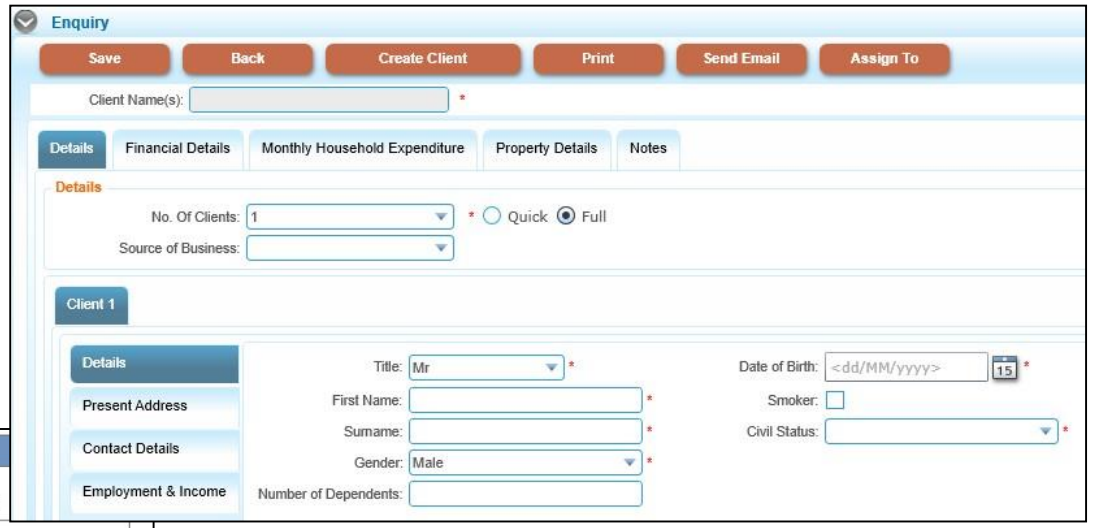
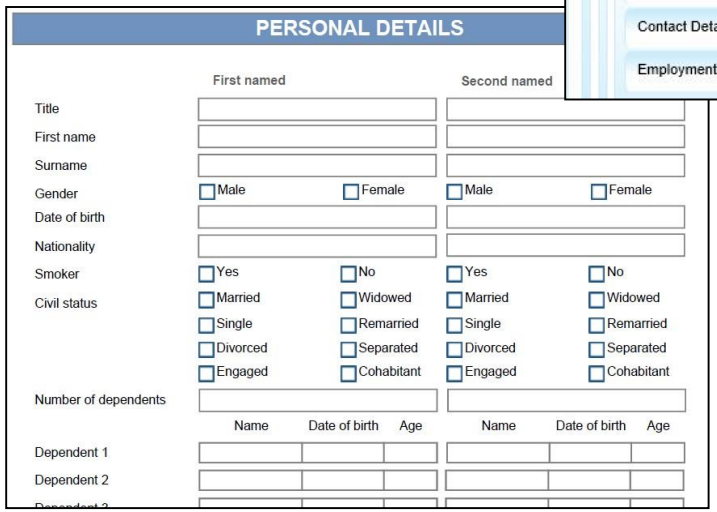
Client Enquiry Wizard

The Client Enquiry form (for financial services or mortgage) can also be completed within Money Advice+CRM by the advisor using a unique wizard reducing the time taken to enter client data.





The Client Enquiry form can be printed for completion by the client or broker manually

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Product Research & Management

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Money Advice+CRM provides a full a suite of quotation and analysis tools, enabling advisors to search and compare providers, premiums & underwriting requirements while issuing product comparison reports, quotations & Reasons Why Letters.

- Advisers have the ability to fully compare and source policies & products against other providers offerings
- Copies of research & comparisons are easily saved and stored against the client file
- Results are returned typically within 1-2 seconds
- The comparison information is fully integrated with Money Advice+CRM pre-populating data for you
- The user can submit applications direct to Irish Life via its B-Line application software.
- There is a full suite of brochures and application documents available (Product Library)
- The software provides Research Reports and Reason Why Letters from the quotation screen

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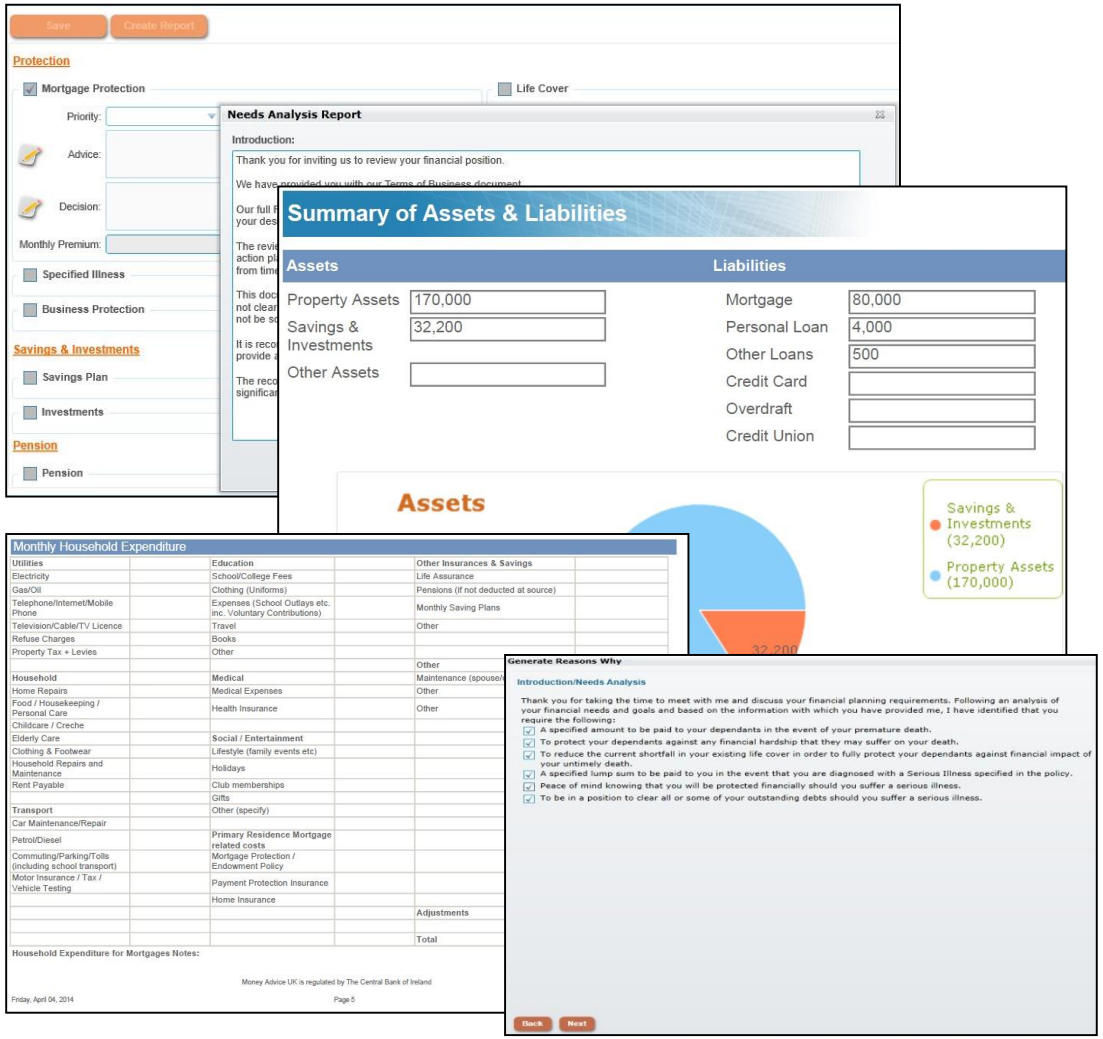
Needs Analysis & Quotations



Following completion of the fact-find and the identification of the clients' needs Money Advice+CRM is able:

- To pre-populate the integrated quotation search engines **for both** Mortgages and Protection
- To save the necessary research and results screens against the client file
- Fact-find can be printed off to be signed by client/s
- Produce a monthly household expenditure report
- Full suite of Reasons Why letters and statements which are pre-populated from the CRM
- The user is able to build their own word templates as required.
- The software has the capacity to provide home insurance quotations and place this business on line with Zurich General (contact support to set up).

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Needs analysis & Quotations

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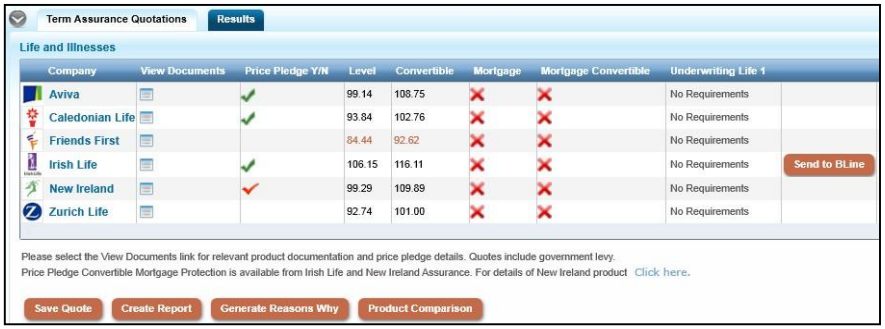
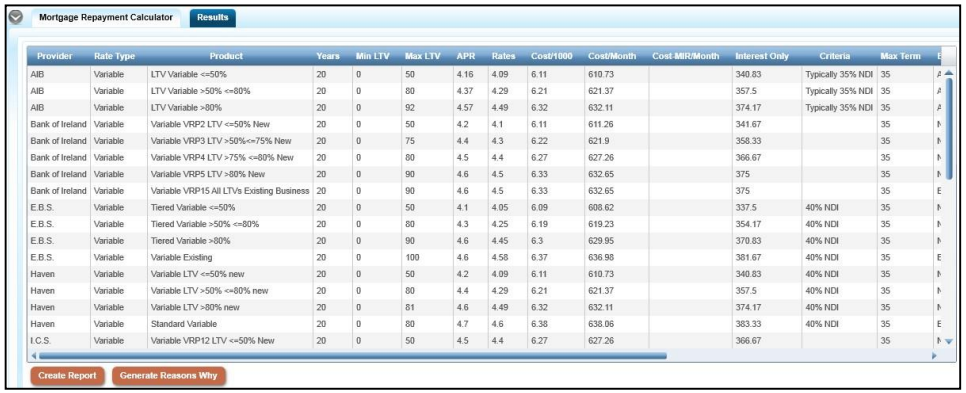
Sample Research Screens

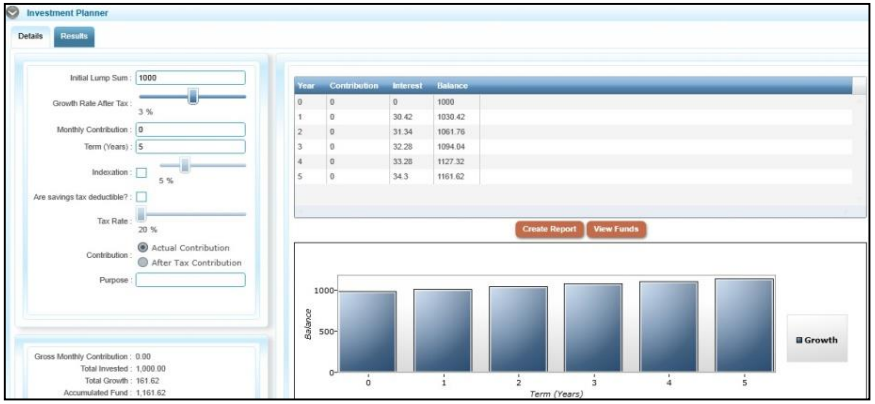
Protection Quotation



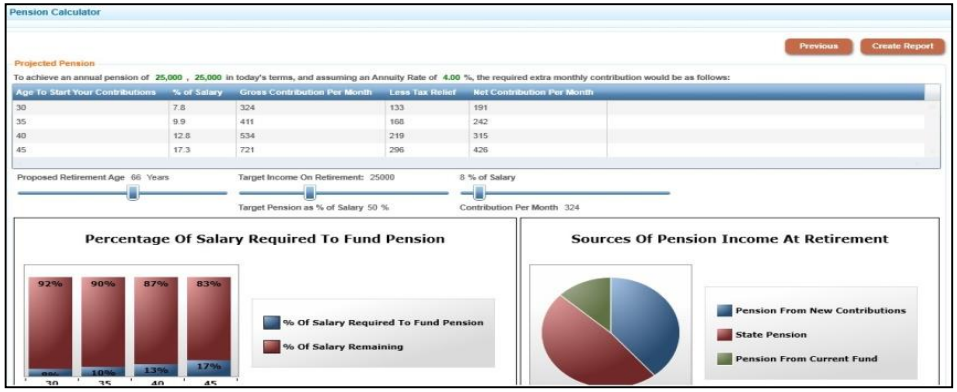
Mortgage Quotation



Investment Illustration



Pension Needs Calculation



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Needs analysis & Quotations

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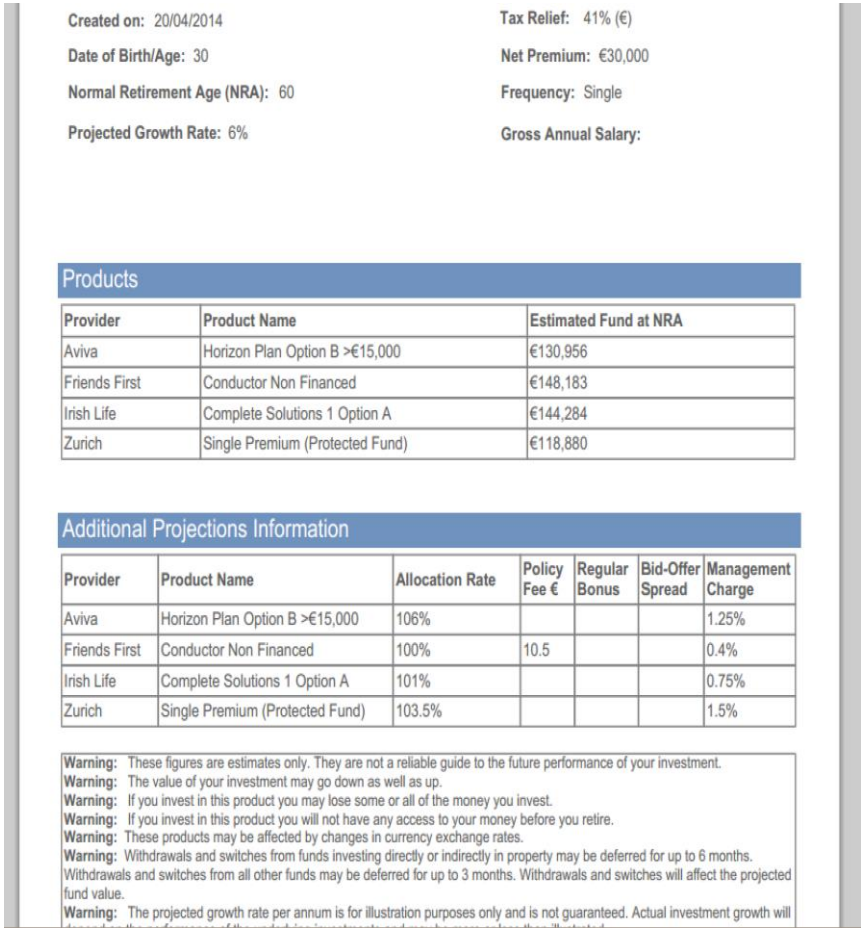
Pensions and Investments

- Needs Analysis
- Risk Profiler
- Client Questionnaire
- Projected Values (regular and lump sum)
- MoneyMate; Values, pricing and fund profile and volatility
- Fact Sheets
- Product Library
- Savings Quotations
- Educational Planner
- Lump Sum Projections

Projections Report



Created on: 20/04/2014
Date of Birth/Age: 30
Normal Retirement Age (NRA): 60
Projected Growth Rate: 6%
Tax Relief: 41% (€)
Net Premium: €30,000
Frequency: Single
Gross Annual Salary:

Products

Provider	Product Name	Estimated Fund at NRA
Aviva	Horizon Plan Option B >€15,000	€130,956
Friends First	Conductor Non Financed	€148,183
Irish Life	Complete Solutions 1 Option A	€144,284
Zurich	Single Premium (Protected Fund)	€118,880

Additional Projections Information

Provider	Product Name	Allocation Rate	Policy Fee €	Regular Bonus	Bid-Offer Spread	Management Charge
Aviva	Horizon Plan Option B >€15,000	106%				1.25%
Friends First	Conductor Non Financed	100%	10.5			0.4%
Irish Life	Complete Solutions 1 Option A	101%				0.75%
Zurich	Single Premium (Protected Fund)	103.5%				1.5%

Warning: These figures are estimates only. They are not a reliable guide to the future performance of your investment.
Warning: The value of your investment may go down as well as up.
Warning: If you invest in this product you may lose some or all of the money you invest.
Warning: If you invest in this product you will not have any access to your money before you retire.
Warning: These products may be affected by changes in currency exchange rates.
Warning: Withdrawals and switches from funds investing directly or indirectly in property may be deferred for up to 6 months. Withdrawals and switches from all other funds may be deferred for up to 3 months. Withdrawals and switches will affect the projected fund value.
Warning: The projected growth rate per annum is for illustration purposes only and is not guaranteed. Actual investment growth will

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Needs analysis & Quotations

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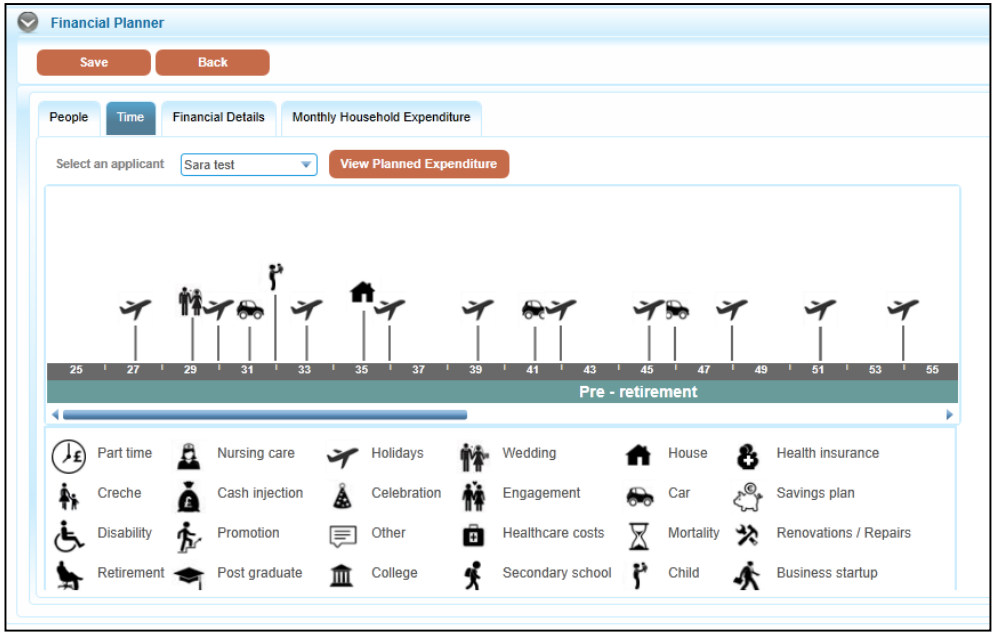
Cash Flow Projections and Financial Planning

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 cash flow projections report to show the income, expenditure 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.



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Mortgages (incl. Haven online)

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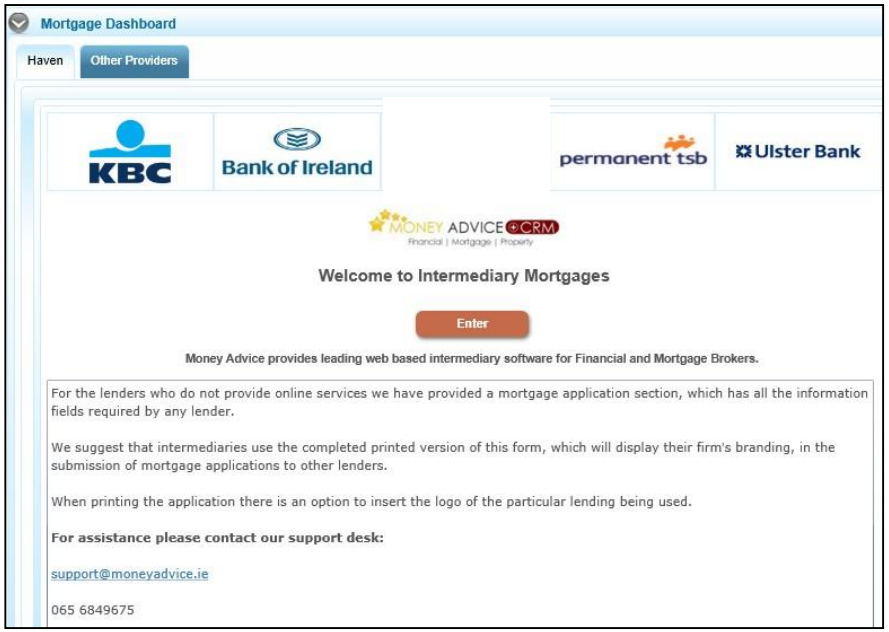
Unlike other CRM software solutions, **Money Advice +CRM provides state of the art, fully integrated mortgage solution software free to all its users.**

As professional advisers you will expect that a mortgage software package has access to the whole of the mortgage market and that the data is updated on a regular basis. Our mortgage software solution provides exactly this.

Our mortgage analysis solution is integrated into our CRM and as such, data need not be keyed twice.

Advisers are able to select from a range of comprehensive filters to produce a highly defined series of mortgage results which can instantly be saved as evidence of research against the client.

There is no need to buy expensive additional mortgage software add-ons or pay for expensive 3rd party integration development – complimentary mortgage sourcing – who'd have thought!



**Data is provided directly to Money Advice by the lenders. Money Advice CRM cannot be held responsible for the absolute accuracy of the data as this is supplied by third party Lenders.*

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Mortgages (incl. Haven online)

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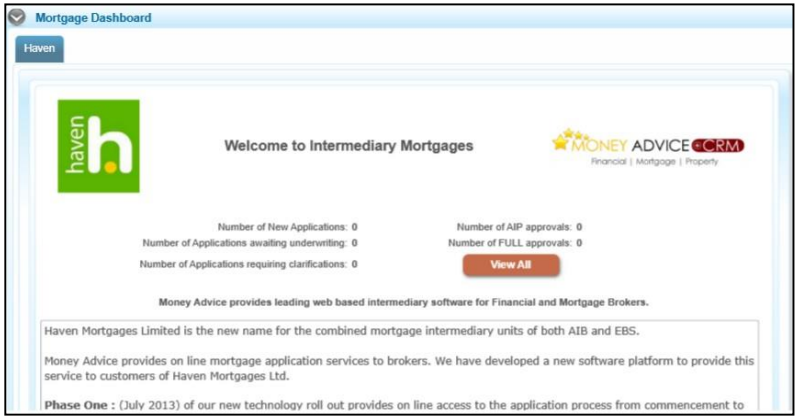
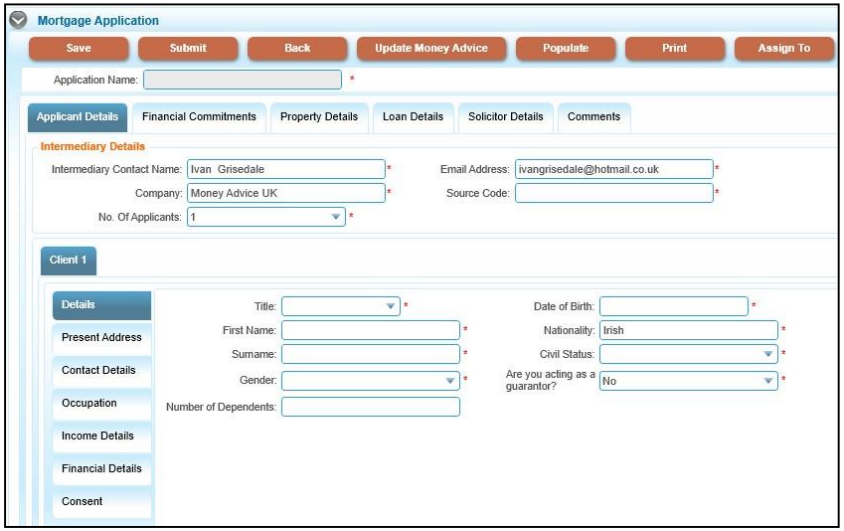
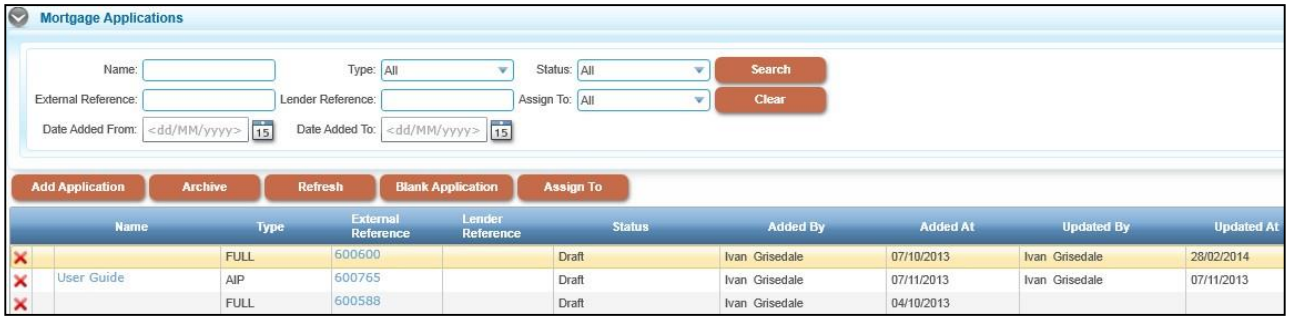
Sample Mortgage Screens

Haven on-line screen and data capture screen





Application tracking



You can also print mortgage applications for submission to other lenders who do not currently accept electronic submissions.

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Insurer Data Downloads

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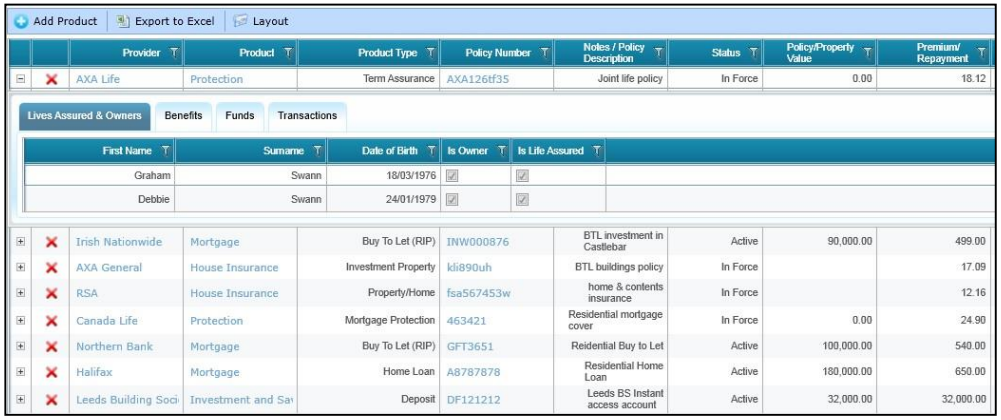
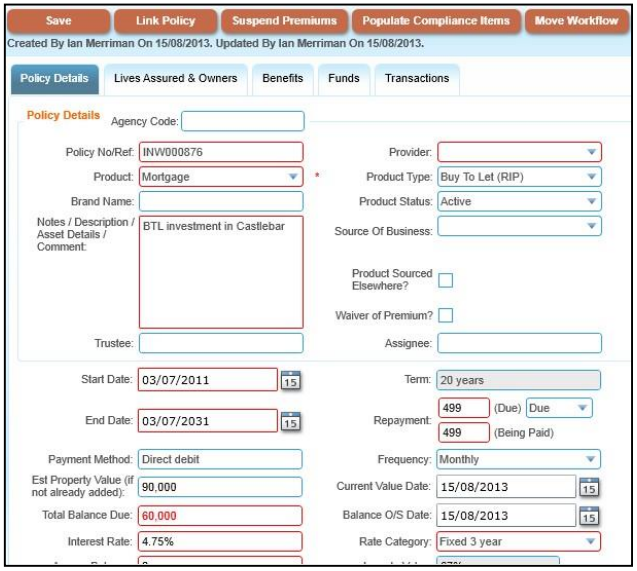
Client and policy data are regularly updated on the system. Up to date policy data are received from: **Aviva, BCP, Caledonian, Friends First, Irish Life, New Ireland, Standard Life and Zurich**.
A tool has been created in Money Advice using which you can now import the policy update excel file received from **Aviva Health** data feed into the CRM system so that you get up to date health policy information.

PIBA

From March 2014 *Money Advice* was appointed by the Life Offices as the second software firm to provide policy data downloads and protection quotations under the PIBA Scheme.





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Sales & Pipeline Management

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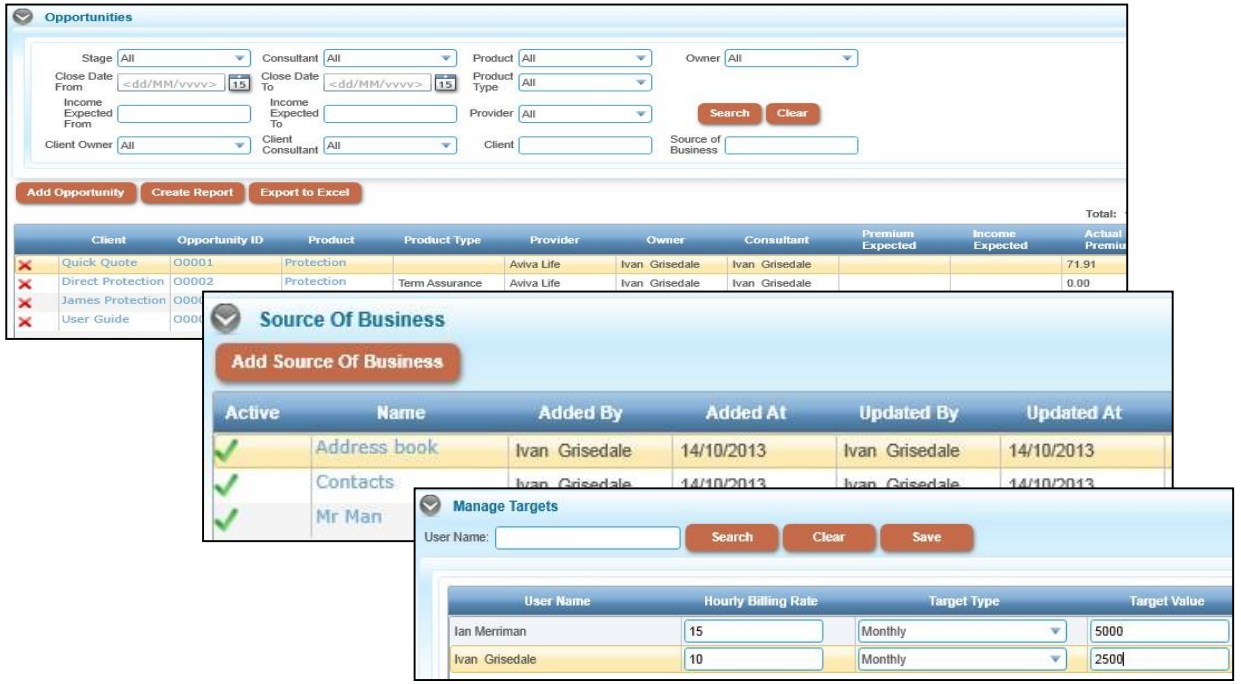
Critical to today's modern intermediary is the ability to manage the entire sales process from start to finish, maintain client data, treat customers fairly and proper relationship management . Money Advice+CRM has been built with this in mind and offers the following as standard:

- Complete lead management processes
- Managing your leads through to conclusion with full range of compliance functionality
- Record your introducers and sources of business

- Actively record all pipeline business by product type, client, provider, individual sales person, teams, offices and probability
- Set targets across the business and actively record progress against those targets and produce appropriate management reports as required
- Setting and monitoring of KPI's, identify key business trends, profitability and future clients and prospects



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Sales & Pipeline Management

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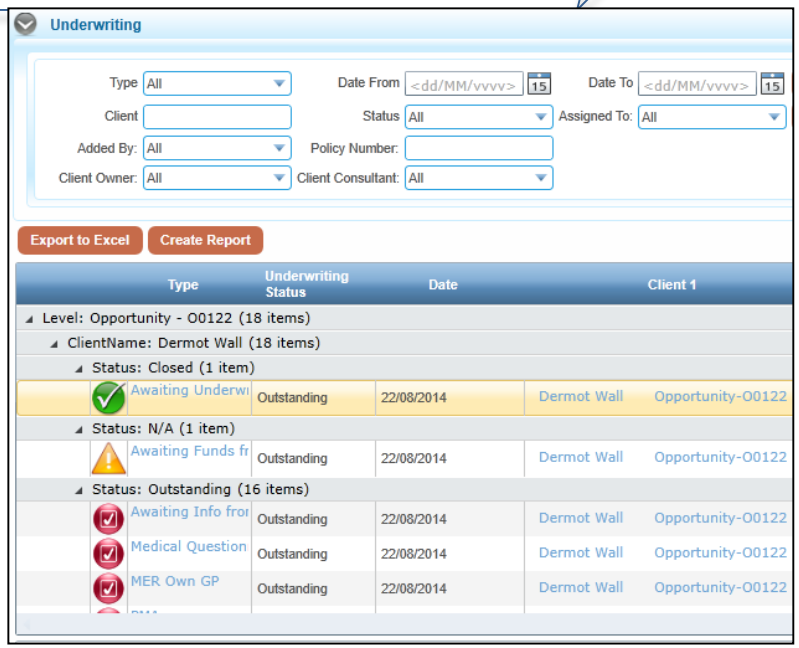
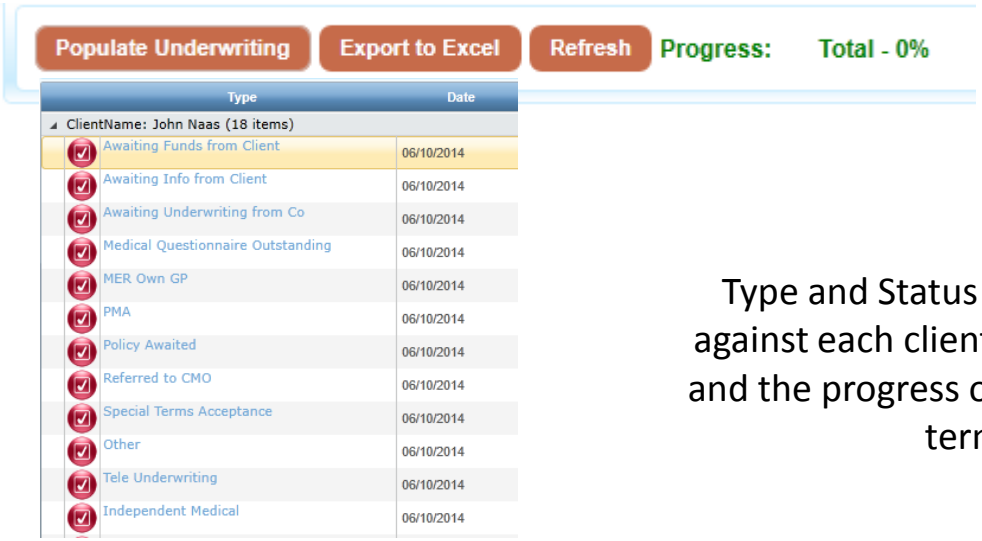
Track Underwriting Status

All stages of Underwriting can be tracked against client & consultant





Type and Status can be accurately monitored against each client individually or in a joint policy and the progress of the underwriting tracked in % terms of completion

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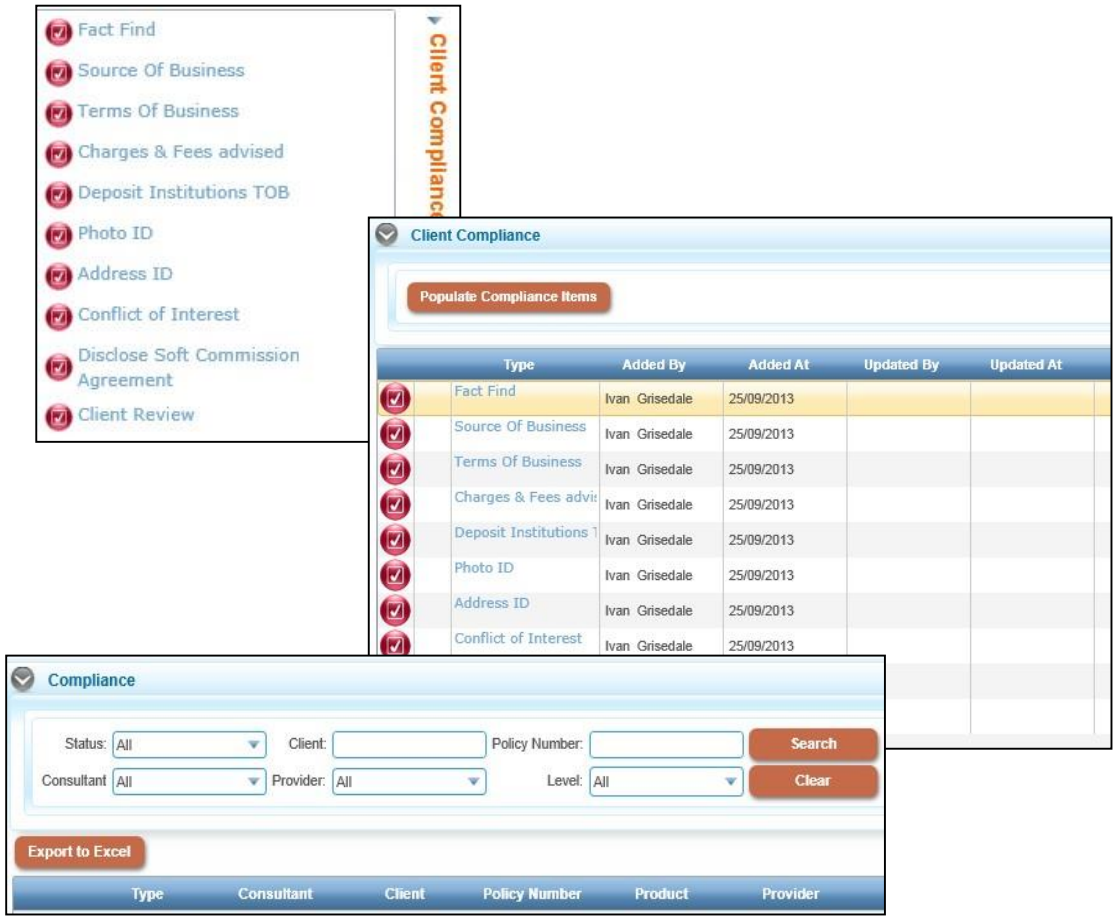
Compliance



Money Advice+CRM offers the user a comprehensive Fact-Find checking facility which is continually monitored as the user completes the Fact-Find.

- The system identifies required items from within the Fact-Find
- Each advisor firm are also able to define the compliance list they wish to use.
- The user is able to click a compliance button at any time to produce a list of outstanding compliance items for tracking
- The user is then able to click on the individual items for detailed information and complete the missing compliance item and attach documents where required e.g. documents, proof of ID etc.
- The system is able to produce compliance reports by status, consultant, provider, policy number or search by level (Policy, opportunity and client)
- Reports are transferred to Excel for ease of use

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CRM, Workflow & Reviews

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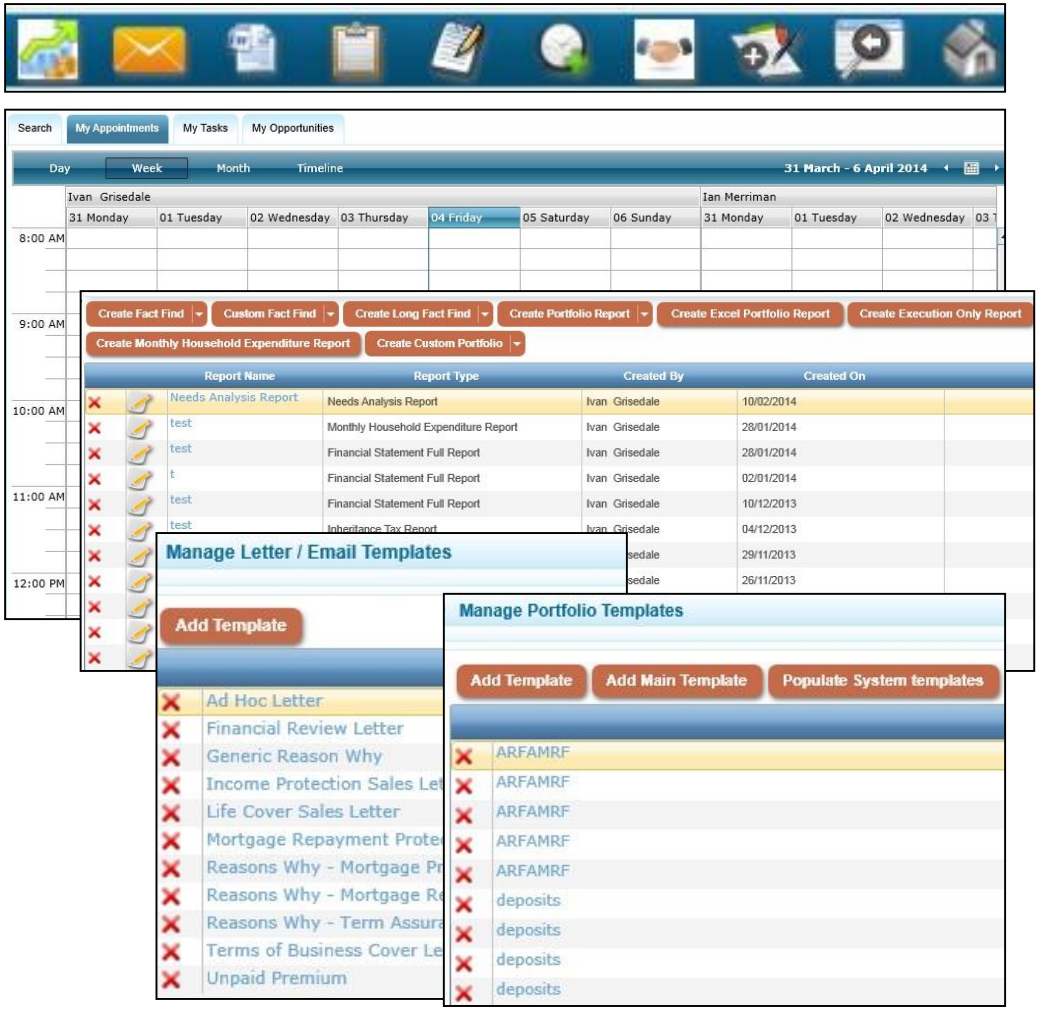
As you might expect, Money Advice+CRM has produced a market leading CRM proposition and delivers in depth functionality to assist with all your desired workflows to make your working day that much easier, supporting & being popular with intermediaries.

- Money Advice+CRM offers the intermediary the perfect tool to manage client contact including client data/information, appointments/diary, tasks, logs, client interactions, meeting memo's, fact-finding/reviews, sourcing, quotations, compliance, marketing, commission reconciliation, document management, reporting, TCF needs, complaint recording, workflow reports at client and database levels. Communications such as letters, emails and mail merges are all easily managed.



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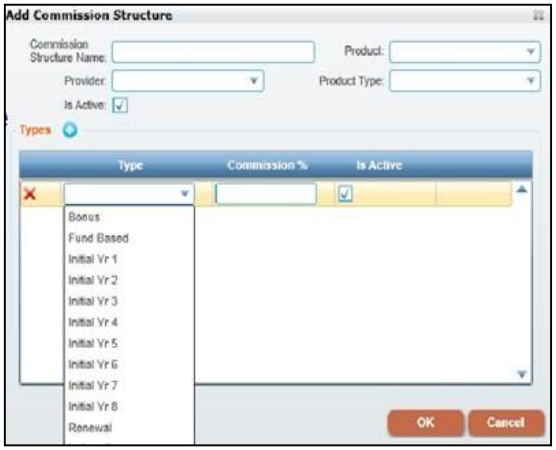
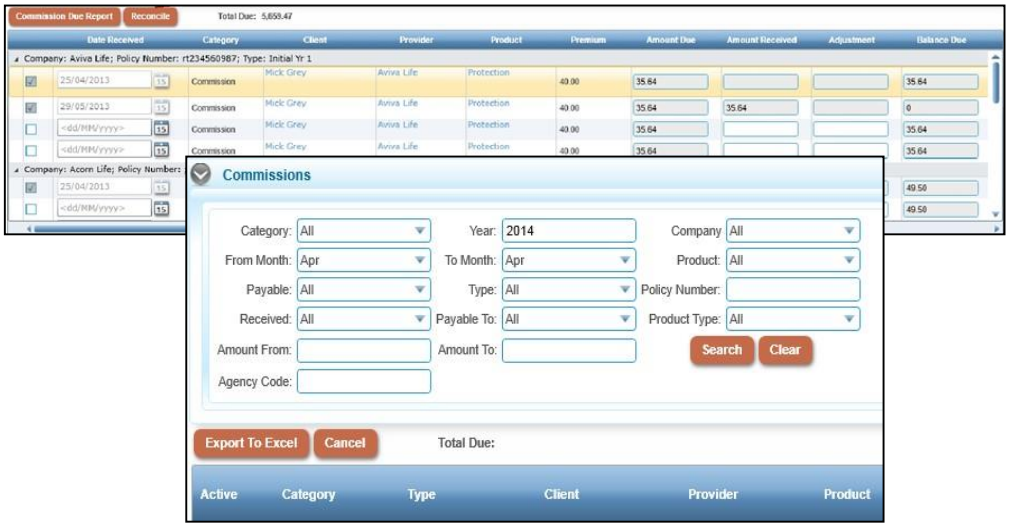
Commissions





Money Advice+CRM hosts a comprehensive set of commission tracking tools allowing the busiest office to keep on top of commissions received, pipeline and keep admin to a minimum.

- The system produces commission reports on a product, advisor and office wide basis.
- Full functionality is offered allowing product, product type, provider, type of commission, commission sum/percentage and commission structures to be added as required.

The commissions/fees can be apportioned individually to individual staff, firm and 3rd parties as needed.

Commissions are easily reconciled against individual policies and personal commission statements produced for advisers, whilst a whole host of reports can easily be generated across a broad range of parameters by provider, product, agency code, staff member, introducer etc.

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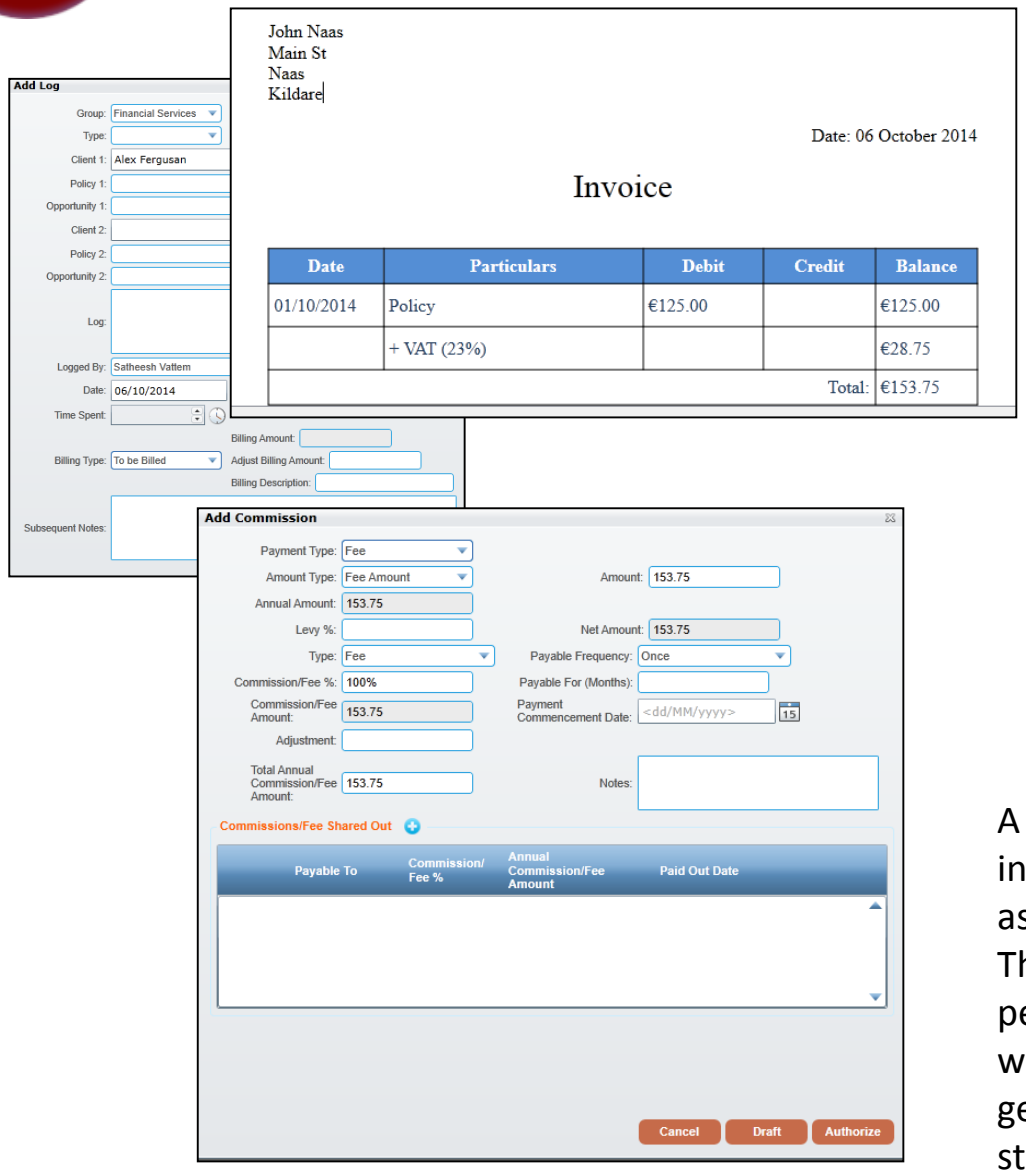
Fees and Invoices



Money Advice+CRM hosts a comprehensive set of tools to keep on top of billable hours, generate invoices for the billable hours and keep track of the status of fees received, pipeline and keep admin to a minimum.

- The system allows for tracking of the billable hours against each action logged in the system.
- Once the billable hours are setup you can select one / more logs to generate an invoice after which the hours are updated with a status of 'Billed' (with or without VAT).

A fees entry is created which can be apportioned individually to individual staff, firm and 3rd parties as needed.

These fee entries are easily reconciled and personal fees statements produced for advisers, whilst a whole host of reports can easily be generated across a broad range of parameters by staff member, introducer etc.

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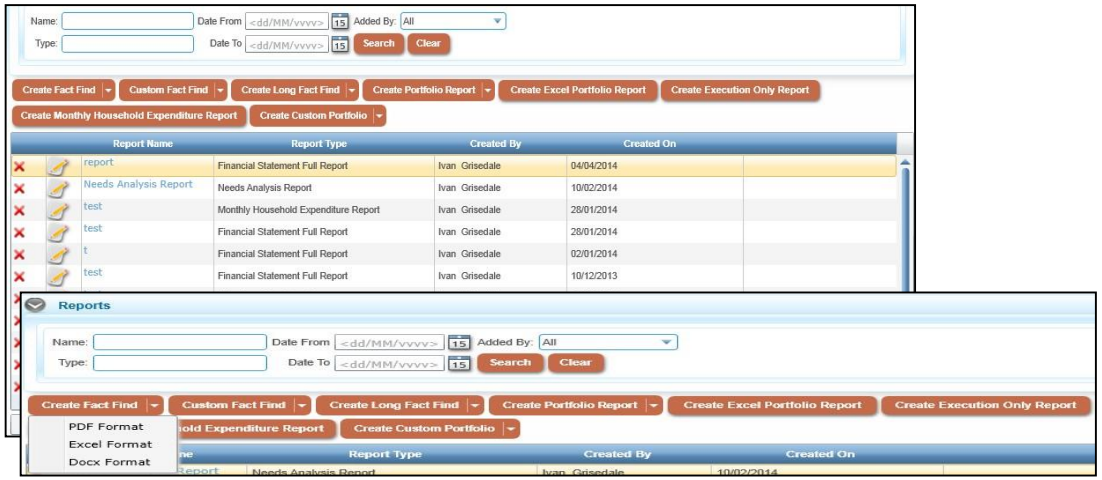
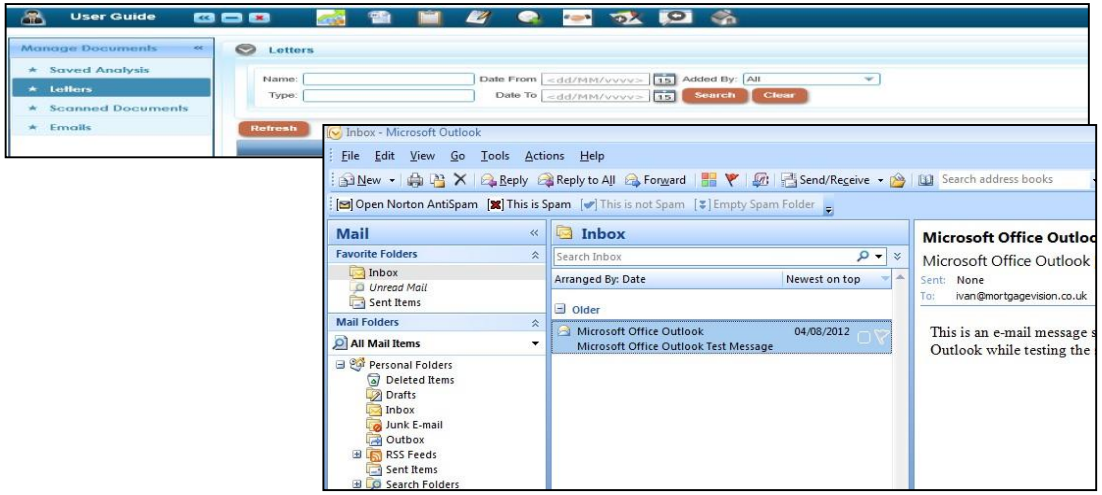
Document Management

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.



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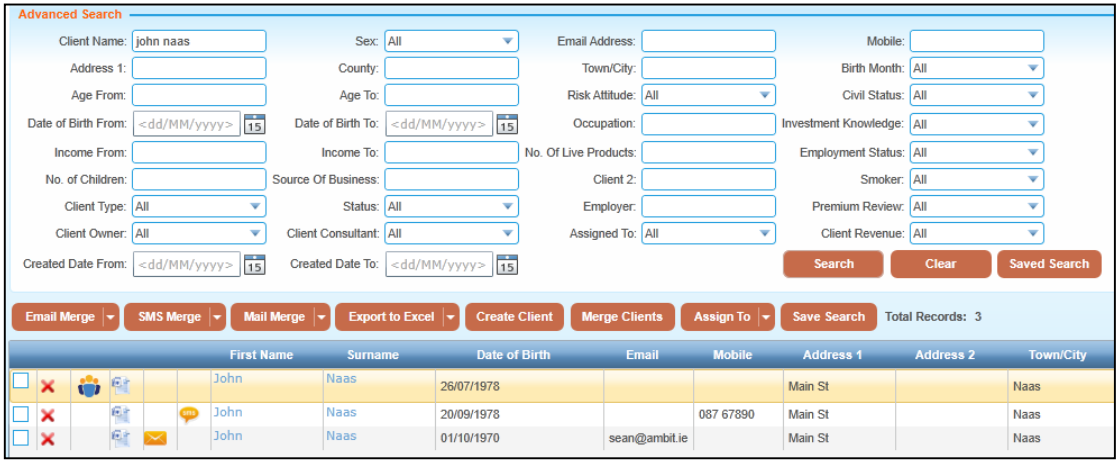
Marketing

MONEY ADVICE+CRM
Financial | Mortgage | Property

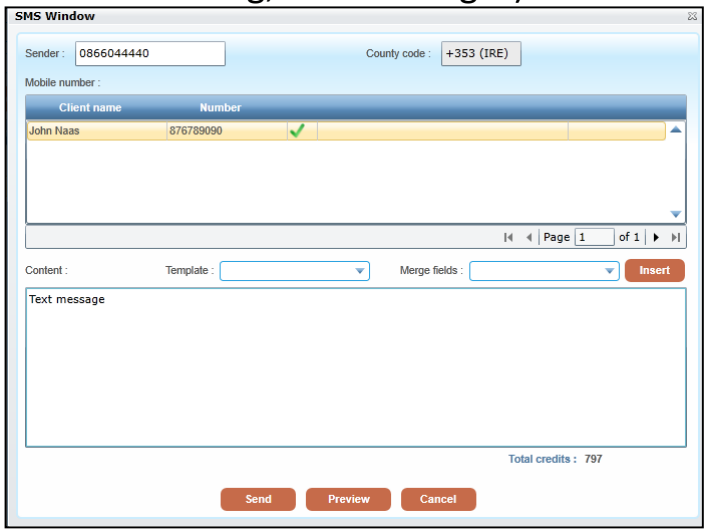
With **Advanced Search** users can drill down to specific clients for mail merges, SMS merges & marketing



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.

Money Advice+CRM provides a comprehensive range of marketing tools including mail, text messaging and letter merges, the ability to write your own letters, text messages and e-mails. Crucially the software is powerful enough to log and record all these communications including incoming and outgoing e-mails, text messages against your client (Even mass mailing, text messages).

Our software additionally records individual customer contact method preference information, a pre-requisite to ensure you have client permission to contact them for future marketing and reviews. Combine this with the ability to brand all your own communications, have access to a comprehensive document library for products you will have the ideal marketing suite to manage your clients and business.



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Product Features

MONEY ADVICE + CRM
Financial | Mortgage | Property

	Feature Name	Money Advice	Money Advice + CRM
CRM, Workflow and Compliance	Client, Product Data Downloads from Life Insurance Providers	✔	✔
	Tasks (Synchronizing with Outlook to be added in next release)	✘	✔
	Appointments / Diary (Synchronizing with Outlook to be added in next release)	✘	✔
	Logs	✔	✔
	Complaints Management	✘	✔
	Meeting Memos with outcome management	✘	✔
	Client Reviews	✔	✔
	Document Management and Cloud Storage (support for indexing of emails from Outlook added)	✘	✔
	Letter, E-mail Merge Facility (support for attaching needs analysis reports / documents from hard disk added)	✘	✔
	Text messaging and merge facility using templates. Logging of texts against client record	✘	✔
	Advanced Market Segmentation and search to facilitate marketing at client and policy level	✘	✔
	Role-based hierarchy to manage access to system, data	✘	✔
	Pipeline Management	✘	✔
	Client Fact Find	✔	✔
	Portfolio Reports	✔	✔
	Financial Statement / Debt Restructure Plan	✔	✔
	Financial Planner with cash flow projections and assset statements	✘	✔
	Compliance Management and reporting (Managing compliance at broker)	✔	✔
	Underwriting Report. (Tracking progress of underwriting by percentage completed for both single and joint policies)	✘	✔
	Client Risk Profiler	✔	✔
	MIS reports on tasks, logs and appointments activity & case tracking	✘	✔
	Fees, tracking hours and Invoice generation	✘	✔
	Client Needs Report	✘	✔
	Data capture form that clients and new enquiries can fill online and have it populate CRM	✘	✔
	Online Proposal Uploads to Insurers	✔	✔

Legend

- New release
- Next release
- Future Release

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Product Features..contd

MONEY ADVICE + CRM
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	Feature Name	Money Advice	Money Advice + CRM
Mortgages	Mortgage Rates	✔	✔
	Loan Consolidation Calculator	✔	✔
	Mortgage Repayment Calculator	✔	✔
	Mortgage Repayment Quick Quote	✔	✔
	Mortgage Review - Compare Mortgages	✔	✔
	Mortgage Review - Extra Payment Calculator	✔	✔
	Mortgage Review - Lump Sum Payment	✔	✔
	Bi-weekly Repayment Calculator	✔	✔
	Mortgage Fact Find / Affordability Calculator	✔	✔
	Mortgage Applications (Online for Haven + Generic Application form for other providers)	✔	✔
	Stamp Duty Calculations	✔	✔
Protection	Protection Review Calculator (with needs analysis & research	✔	✔
	Inheritance Tax Calculator	✔	✔
	Term Assurance Quotations	✔	✔
	Pension Term Quotations	✔	✔
	Unit Linked Quotations	✔	✔
	Whole Of Life Quotations	✔	✔
	Income Protection Quotations	✔	✔
	Business Assurance Templates	✔	✔
	New Ireland Life Choice	✔	✔
	New Convertible Mortgage Protection	✔	✔
	Serious Illness Comparison List	✔	✔

Legend

New release
Next release
Future Release

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Product Features..contd

MONEY ADVICE + CRM
Financial | Mortgage | Property

	Feature Name	Money Advice	Money Advice + CRM
Investment	Savings Planner	✔	✔
	Future Funds Calculator	✔	✔
	Funds Search	✔	✔
	Funds Profile + Ratings (from Moneymate)	✔	✔
	Investment Quotations (projected values)	✔	✔
	Funds Factsheets (Fund information from MoneyMate of over 900 funds)	✔	✔
	Market Commentaries	✔	✔
	Deposit Interest Rates	✔	✔
	Education Planner	✔	✔
	Unit Linked Bonds	✔	✔
	With Profit Bonds	✔	✔
	Tracker Bonds	✔	✔
	Savings Plans	✔	✔
Pension	Pension Needs Calculator	✔	✔
	Pension Quotations (projected values)	✔	✔
	Group Pensions	✘	✔
	Regular Premium PRSA	✔	✔
	Regular Premium (Personal/Executive/AVC)	✔	✔
	Single Premium (Personal/Executive/Buy Out Bond)	✔	✔
	ARF/AMRF	✔	✔
	Annuity Rates (ILAC)	✔	✔

Legend

New release
Next release
Future Release

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Product Features..contd

MONEY ADVICE + CRM
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	Feature Name	Money Advice	Money Advice + CRM
General Insurance	Zurich Home Insurance Quick Quote	✔	✔
	Zurich Home Insurance Full Quotation (including business placement facility)	✔	✔
	Link to HIA website	✔	✔
	Import tool for Aviva Health Policies	✘	✔
	Links to Aviva Health website	✔	✔
Tools	Product Library with document links	✔	✔
	Quotation/Research Reports	✔	✔
	Reports with broker own branding, logo	✔	✔
	"Reasons Why" Letter Generation	✔	✔
	Deloitte Personal Tax Calculator	✔	✔
	Website Links	✔	✔
	FAQ	✔	✔
	User Preferences/Administration	✔	✔
	Save Quote/Report	✔	✔

Legend

New release
Next release
Future Release

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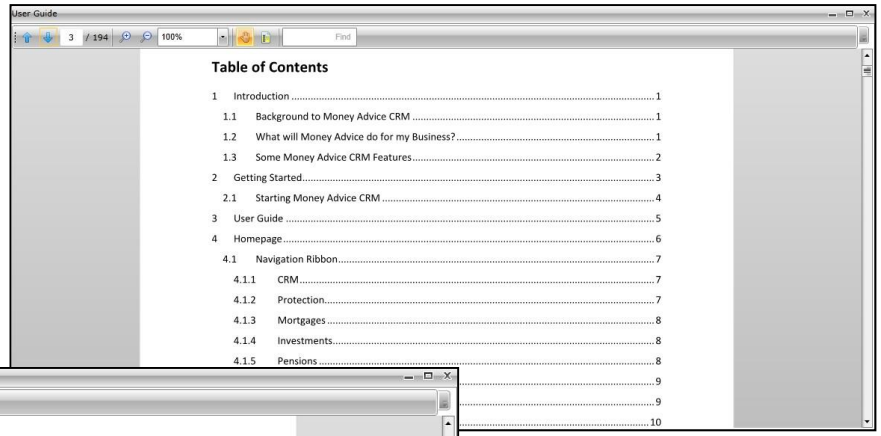
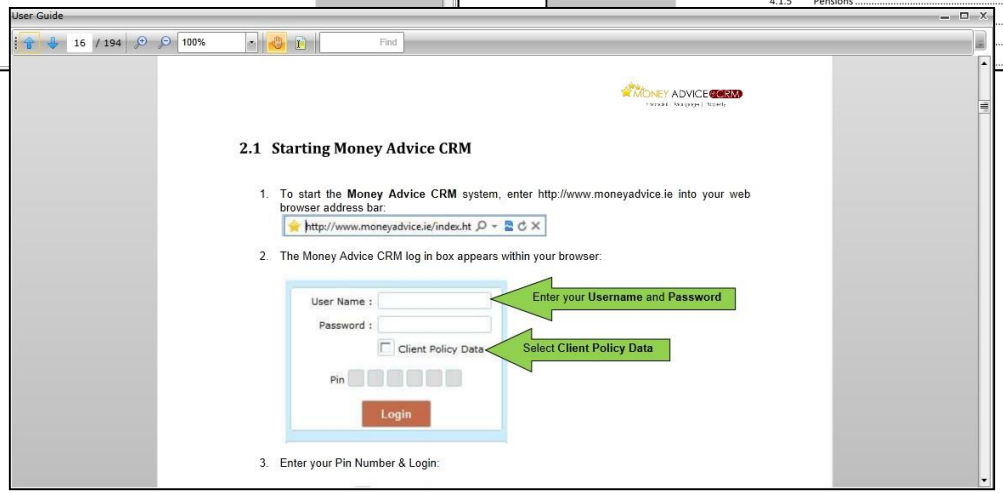
User Guide

Easy to use online guide providing full training & workflow support. Fully searchable content & navigation using pictorial narration for speed of learning.





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Tablet & Smart phone quotations

MONEY ADVICE CRM
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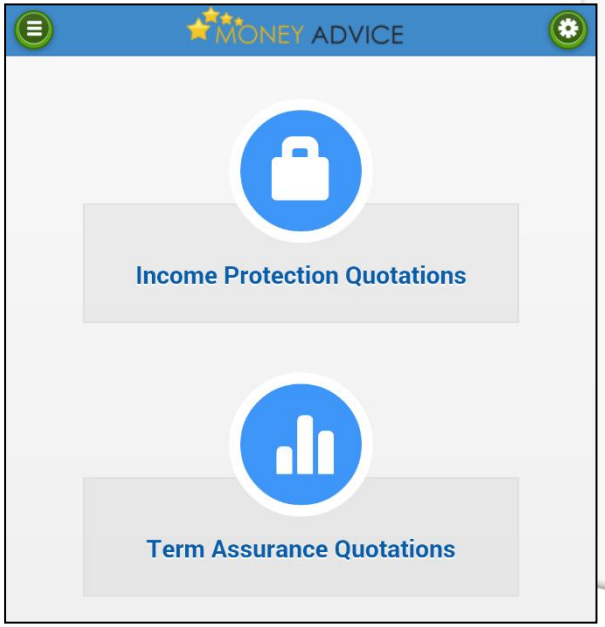
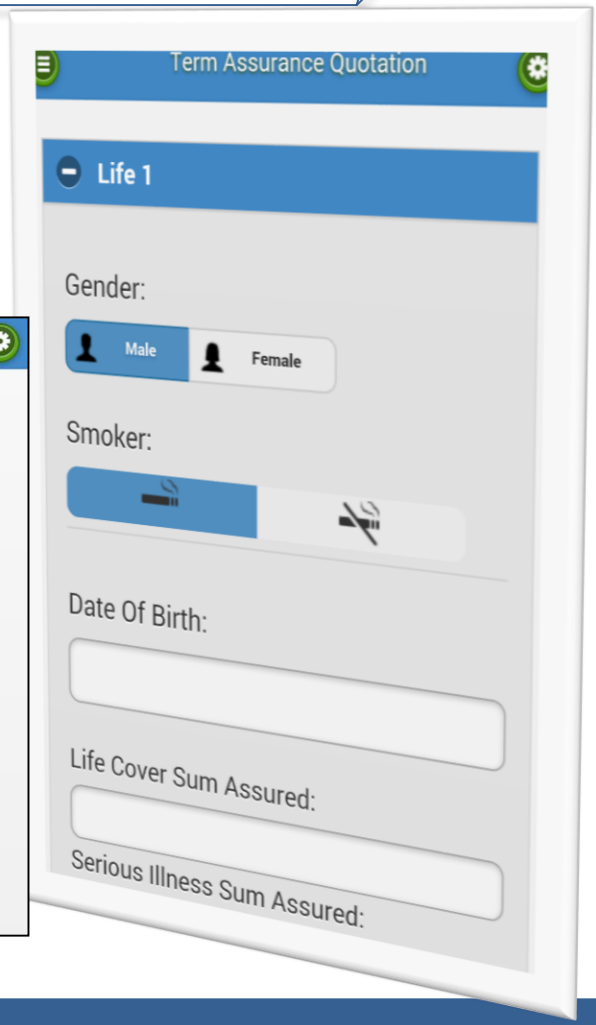
*A mobile version of the **Money Advice** quotation service is available ensuring you have access to the quotations even on the move.*

- The service provides all term assurance and income protection quotations from all providers
- This service can be accessed on

  ALL internet-enabled tablets and mobile phone devices compatible with
  - iPad
  - iPhone
  - Blackberry
  - HTC
  - Samsung
  - Others





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Best price quotations for Broker web sites

MONEY ADVICE + CRM
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Provide advice through best price quotes on your web site and receive email notifications of all the enquiries generated.

- Integrate with existing broker web sites seamlessly
- The service provides all term assurance, income protection and mortgage protection quotations
- Only the best price quotation would be shown
- Discounts provided by the brokers can also be accommodated

- All enquiries are emailed to a pre-configured email address
- For ***Money Advice + CRM*** users, the details of the client and quote are pre-populated as a new lead and an opportunity associated with this lead in the system
- An email to the end customer with broker logo, configurable text, and terms of business attached will also be sent

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Mobile optimised web sites

MONEY ADVICE CRM
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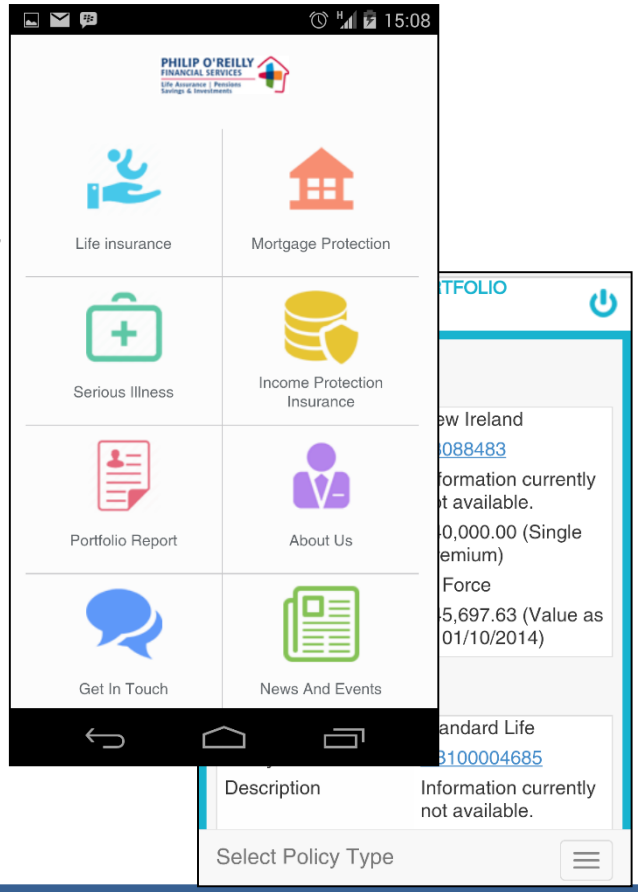
A mobile optimised web site presenting just the right and relevant set of information in a specifically tailored format that works on the various smart phone devices.

- Provide advice through best price quotes
- Deliver policy, portfolio information to clients in an interactive manner.
- Tell your customers more about your services, news, blogs, and events through mobile optimised content
- Engage more closely with your prospects and customers through 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
- Choose from multiple design templates
- Content Management System (CMS)



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Contact Us

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Managing Director

Philip O'Reilly

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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.

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We are working with

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Product Providers working with *Money Advice* (Supported by PIBA scheme)

PIBA

AVIVA Life Insurance

AVIVA HEALTH

BCP Asset Management

Friends First
PART OF ACHMEA
Friends for life

Irish Life

NEW IRELAND ASSURANCE

ROYAL LONDON

Standard Life

ZURICH®

haven

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