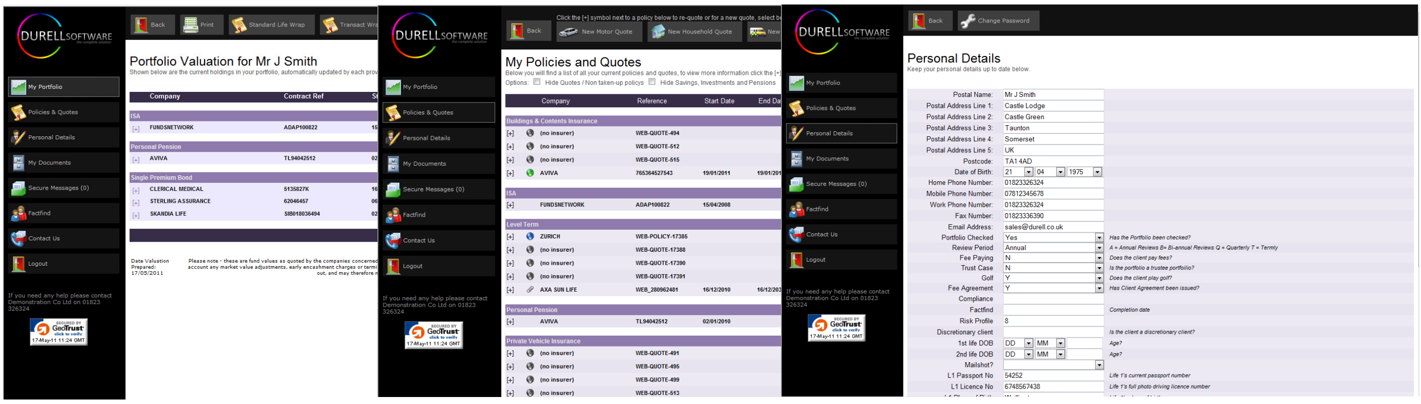
Web-link - The future of Client Facing Services is here today



The Durell Web-link allows you to publish policy, investment and personal information as well as secure messaging, and instant quotations for prospects and selected clients via your website, where they can review their own data and instruct you to make purchases or changes. You may include client fact finds if you wish, and optionally add motor and household insurance quotes. Controls allow you to restrict these services to selected clients.

You can use the Durell web-link to allow selected clients to view any of the following aspects of their data direct from your website...

Personal Details this screen allows your clients to view and update their basic personal details, such as address, date of birth, telephone number, etc. You can also control which fields are displayed on this page using our Mailshot system which allows you to define up to 54 additional fields, so you can add national insurance number, salary, or anything else you wish. You can also turn each individual field on/off and control which fields the client can update.

Document Viewer using the online document viewer you can select any number of documents you want to be made visible to your client (i.e. policy documents, letters etc.) These documents are downloaded directly from your system upon request so any changes you make will be visible to your client in real-time. Using this method allows you to upload as many documents as you wish at any one time.

Secure Messaging use our secure messaging feature if you wish to communicate directly with your client via your Web-link screens. You can send messages to your clients from within the Durell system and these messages will appear instantly to your client when they log in. You can even attach a link to a document should you wish to request confirmation from your client. No messages sent from/to the Web-link system can be edited by you, or the client - so you can use this feature to sign-off documents, confirm any fact find changes, etc.

Contact Details display full contact information for your company, including address and phone number.

Financial Services professionals can also display the following:

Instant Valuations you can choose to set up your Web-link system so that when a client logs in to their Web-link service their portfolio will automatically update with the most recent prices direct from the insurer. If a "live" valuation is not available for any reason, the system will automatically display the last valuation. Alternatively for £25+VAT per month you can have a daily Financial Express feed which the contract enquiry will refer to for price updates in the event of a valuation failure, instead of displaying the last valuation.

Asset Allocation displayed in the form of a chart, the asset allocation page will show the client how their investments are currently split between policy types, sector, etc.

Policy List a detailed breakdown of each of the client's policies, displayed in a tablature format.

Fact Find our fact find layouts are completely user-definable and the Web-link system allows you to display this fact find to your client exactly as you see it within your local system. You also have the choice of displaying an editable copy or simply displaying a "historic" version, should you wish your client to sign off the information contained therein.

Protection Quotes allow your clients access to online life quotes (for term protection, ASU protection, income protection, etc.)

General Insurance professionals can also display the following:

Car and Home Insurance Quotes our Web-based motor and household quote system allows you to offer your clients their own quote facility via your website. To prevent pranksters setting-up hoax policies the web-based system is restricted to quotes, the details of which are downloaded overnight to the office copy of Durell for processing by trained staff.

The key benefits to you will be…

- ✓ You can choose to charge a fee for this service
- ✓ Your clients will view your website more frequently, hence noticing any news or special offers etc.
- ✓ You can create a 'One-Stop-Shop' for all of your clients' insurance and investment needs
- ✓ You can offer a value added extra to your existing service, important for the post RDR environment

You will need…

- A Durell system (e.g. Financial Adviser) to provide the source data
- A Durell Web-link (costs £250+VAT with £27.50+VAT per month servicing charge)
- A suitable website on which to host the Web-link
- A broadband internet connection—we recommend that your server has an upload speed of at least 1Mbps to ensure the fastest possible loading speeds

"The benefit of the Web-link has exceeded our initial expectations. In addition to reducing our paper, postage and printing costs, it is also saving us time. Less time completing fact finds, less clients making phonecalls for valuations, less time collating paperwork and reports.."

Gary Lindop, Managing Director of Coventry Money Centre Ltd