



Web based Valuations

The Durell 'On-Line Service' allows you to publish policy, investment and personal information 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 - possibly those paying a monthly fee.

Durell's "Financial Adviser" and "Mortgage Manager" products both include Investment Portfolio Management software that allows for instant on-line valuations via Internet links to key investment companies like Cofunds, Transact, Norwich Union, Prudential, Zurich, Clerical Medical, Standard Life, etc. Of course these valuations can be printed periodically and sent to your clients by post, but instead you may now choose to publish them on your website (n.b. with password protection) so you can save time and postage costs while also giving your clients up-to-date values.

- ✓ Your clients can check their valuations and order new "buys" and "Sells" by email
- ✓ You'll save the time and cost of printing and posting portfolio valuations
- ✓ You'll be able to provide your clients with up-to-date valuations
- ✓ You can choose to charge a fee for this service
- ✓ Your clients will view your website more frequently, hence noticing any special offers, etc

Company Fund	Contract Ref Sector	Started	Units	Hold By Unit Price	Current Value Fund Value	Growth %
DEK						
NORWICH UNION	78643257462135 UK All Companies	08/10/2001	1,852,000.00	148	3,167.41	5.58%
Personal Pension						
AXA SUN LIFE	476347623467 UK Stocks Companies	08/10/1996	34,425,000.00	148	62,090.00	31.63%
Single Premium Bond						
CLERICAL MEDICAL INVESTMENT GROUP	431347134176 Investment Managed	08/10/1998	3,497,000.00	148	11,084.50	10.85%
CLERICAL MEDICAL INVESTMENT GROUP	431347134176 Investment Managed	08/10/1998	3,788,000.00	148	5,441.00	5.64%
Total Value:					76,252.00	

Data Valuation Prepared: 09/12/2008. Please note - these are fund values as quoted by the companies concerned and are not guaranteed. The values shown may not be current and do not take into account any market value adjustments, early encashment charges or terminal bonus on surrender of maturity. The fund values may include sums withheld in or out, and may therefore not equal the original investments. Print Date: 02/10/2010

Benefits to you will be:

- ✓ You can choose to charge a fee for this service/s
- ✓ Your clients will view your website more frequently, hence noticing any special offers, etc
- ✓ Create a 'One-Stop-Shop' for all of your clients' insurance & investment needs

You will need:

- ✓ A Durell Solution (e.g. Financial Adviser) to provide the source data
- ✓ A Durell 'On-Line Service' (costs £250 +VAT with £27.50 +VAT per month servicing charge)
- ✓ A suitable website on which to host the 'On-Line Service'
- ✓ A broadband Internet connection to regularly update your on-line data