

life & pension distribution functional data sheet

focus:360° life & pension distribution is a straightforward point of sale solution for selling high volumes of protection, retirement and investment products. The solution enables you to automate the sales and administrative processes associated with delivering advice to your clients.

product features

- business opportunity generation
 - lead management
 - alert generation
- advice/sales process
 - document generation
 - agenda setting
 - client objective management
 - personal fact find
 - corporate fact find
 - case document management
 - attitude to risk questionnaire
 - investment needs analysis
 - pensions needs analysis
 - protection needs analysis
 - IHT needs analysis
 - quote management
 - Assureweb TPI quote integration
 - Assureweb Ape quote integration
 - needs & recommendation process
 - anti-money laundering capture
 - suitability letter generation
 - case submission
 - case notes management
- single client view
 - client details & provision summary
 - contact management
 - outlook integration
 - portfolio valuation
 - Financial Express price feeds
- client relationship management
 - alerts generation
 - mail merge
 - client information portal
 - annual report
- distribution management tools
 - case checking
 - training & competency
 - TestMeOnline content
 - new business processing
 - management information
 - task management
 - remuneration management
 - commission EDI feeds
 - agency management

technology

- web browser based .NET2 solution
- scaleable SOA architecture
- enterprise security
- SQL server 2005 database platform
- on/offline deployment

non functional features

- highly configurable
- flexible look & feel
- autosave