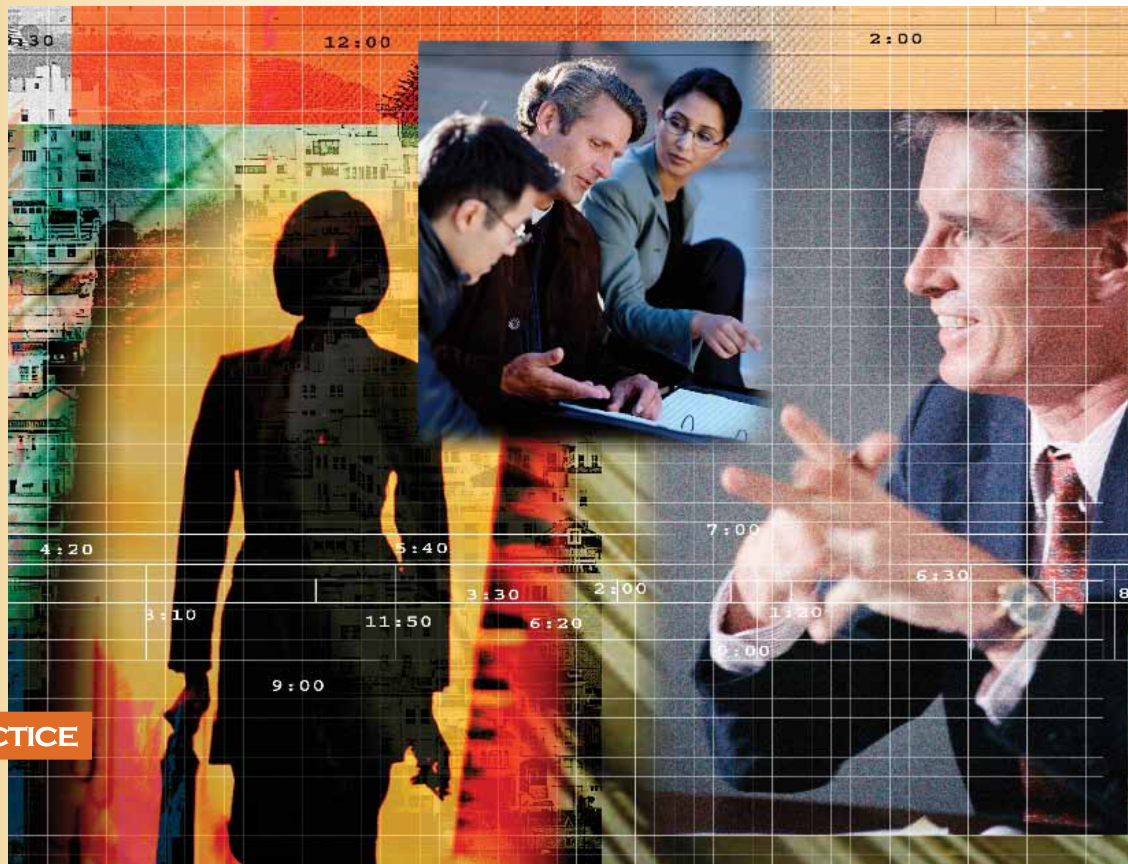
SmartOffice®

For Practice Management



PROVEN IN PRACTICE

Product Overview

> *The #1 relationship marketing solution for insurance and wealth management advisory practices*

SmartOffice®

How would your business change if more of your clients made the 'A' list?

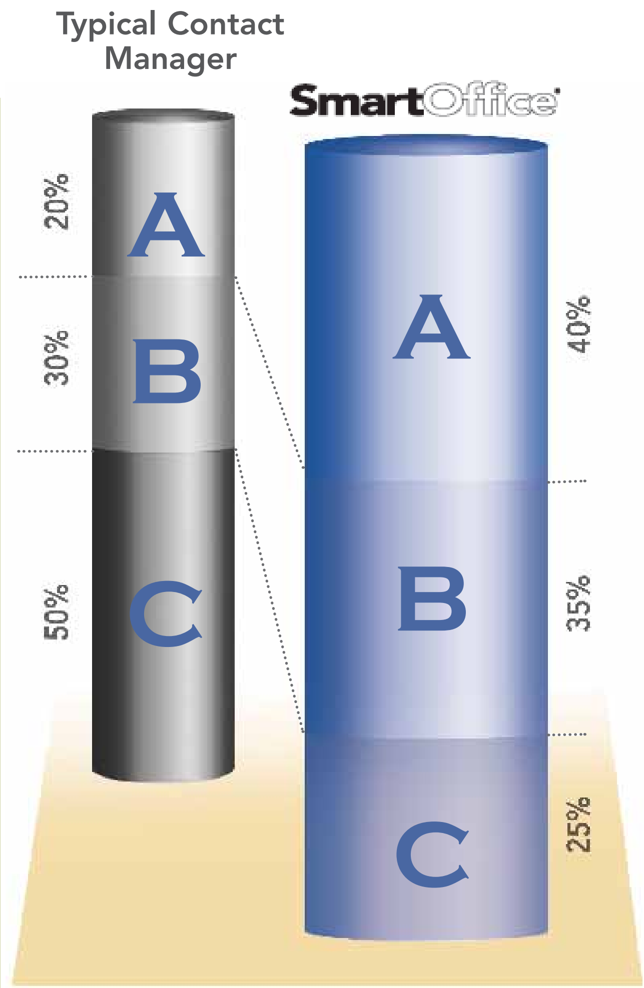
> *"Like many practices, we can't afford to make personal contact with all of our clients. Now, using SmartOffice, we continuously reach out to all clients, staying top of mind as their resource for financial solutions. Not surprisingly, it's these efforts that have uncovered some of our most profitable clients."*
>
> **Gary Schwartz**
> Financial Advisor

Successful professionals build strong, trusted relationships with each client — from the affluent 'A' list through the less profitable 'C' list. But cultivating those relationships takes time, and the return from each one varies dramatically.

To do it all — and do it well — you need SmartOffice® for Practice Management from Ebix CRM. A web-based client and practice management system, SmartOffice is designed to help financial advisors increase their returns from higher value accounts.

At the same time, SmartOffice offers bottom-line benefits by helping your team accelerate the speed of everything from new business processing, to portfolio management, to consolidated reporting, compliance, and commissions tracking, giving them more time to support your expanding 'A' list.

The result: A greater number of 'A' list clients that drive more revenue in less time



> SmartOffice helps you uncover more A- and B-level clients, increasing the return on your time and the commissions you earn

Practice management designed specifically for your business

Available on-demand via the web, or installed right in your office, *SmartOffice for Practice Management* is designed from the ground up to meet the unique needs of your financial services business.

Like many advanced relationship marketing systems, SmartOffice helps you track client data and history, monitor and schedule sales activities, and manage your day. And its marketing features help you uncover sales opportunities with existing clients and new prospects.

But SmartOffice does much more.

Unlike generic contact management systems, SmartOffice offers the features you need to track critical financial services data, including:

- **Household members**
- **Multi-line policies and investments**
- **Commissions**
- **Compliance**
- **New business/ pending cases**

> **Help establish and strengthen trusted client relationships**
>
> **Improve customer retention and safeguard your book of business**
>
> **Increase sales by uncovering new opportunities within your existing client portfolio**

SmartOffice® for Practice Management

Deliver superior solutions and higher levels of service, resulting in increased customer loyalty, endless referrals, and a growing book of business.

Establish and Maintain Your Role as Trusted Advisor

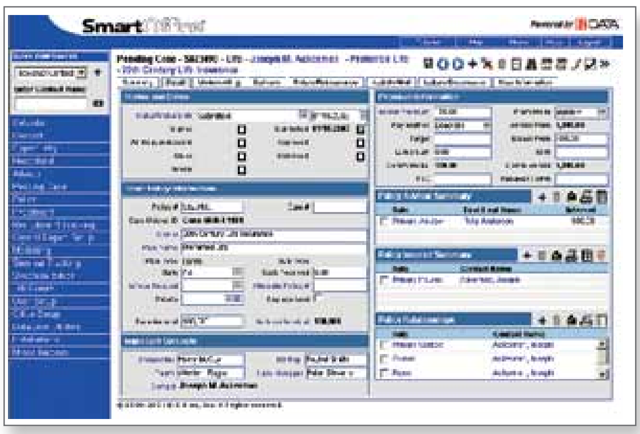
Sales

- ### Client and Account Tracking

  Build trusted relationships.
  Everyone in your practice will benefit from the comprehensive view of each client's business and family relationships, client documents, holdings, appointments, meeting notes and email exchanges.

- ### Calendar Management

  Plan your work and work your plan.
  Track your appointments, phone calls, projects, and associated follow-ups. You can manage your own time and that of your staff, viewing the complete history of activities for a client in SmartPad.



Manage pending cases, including underwriting requirements and activity. Integrated electronic updates from leading insurance carriers increase the efficiency of agency operations.

- ### Client Journaling

  A complete history of client interactions.
  The SmartOffice SmartPad™ keeps track of all client interactions, from appointments and to-do items, to email and other correspondence. Anyone in your practice can be quickly up to speed and responsive to your client's needs.

- ### Microsoft Outlook® Integration

  Freedom to move between your favorite applications.
  If you use Outlook to send email, manage your schedule, or track contacts, no problem. SmartLink for Outlook synchronizes these items with ease. A complete history of Outlook activity is tracked in the SmartOffice SmartPad, without the hassle of double entry.

- ### Sales Opportunities & Forecasting

  Drive the success of your sales team.
  With the ability to manage your pipeline of sales opportunities, you can increase the effectiveness of sales activity and eliminate the burden of forecast reporting. Map your team's best practices and track the progress of each opportunity by sales stage. Managers can view activities, plan sales strategies, and coach the techniques that close sales.

- ### Needs Analysis, Planning & Illustrations

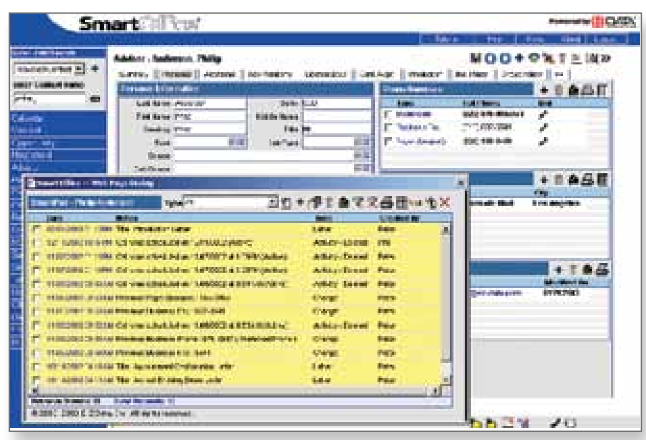
  Provide trusted financial advice.
  To better understand your clients' needs and to more effectively sell your recommendations, SmartOffice lets you take advantage of today's leading needs analysis, financial planning, and illustration tools. Pre-integration with a variety of third-party solutions are in the planning stages.

- ### Commission Tracking

  Track carrier commissions with ease.
  Whether your agency uses standard or custom commission structures, SmartOffice helps you track commissions due and paid, as well as supplemental payments and override splits — even when dealing with complex hierarchies and multiple distribution channels. The solution can also be integrated with your existing legacy accounting systems to simplify the tracking process.

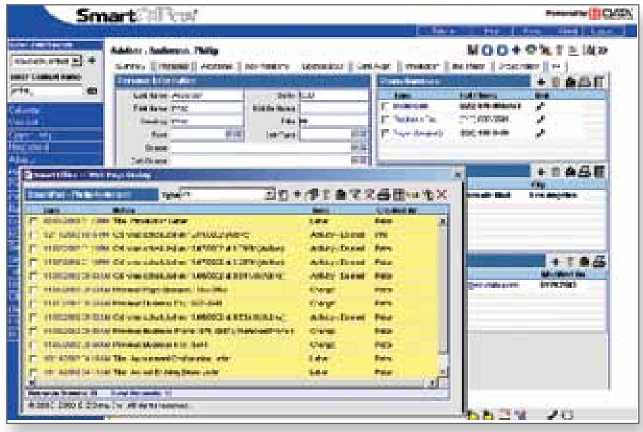
- ### Document Tracking

  Eliminate the need to 'pull that file'.
  A centralized repository for both electronic and scanned documents, SmartOffice is your electronic file cabinet. From application forms to client correspondence, it supports most all document and image types, providing quick access to client documents without searching through paper files.



Integrated contact management provides a complete history of each relationship, enabling your firm to deliver consistent, superior service to every financial advisor.

* Some SmartOffice features are available as optional modules.
Your sales representative can help you configure a solution that's right for you.



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MARKETING

Helping you build a stronger book of business

- **Dynamic Reporting & List Management**

  Cross marketing increases the return on existing relationships.
  Use dynamic queries to analyze your client base and find opportunities to cross-market other products and services. Generate lists of prospects and conduct your marketing campaigns via mail, email, or telephone to drive new sales.

- **Mass Email/Direct Marketing**

  Simplify your mass marketing efforts.
  Using existing contact information, you can generate and print mail merge letters or broadcast email/fax blasts. A messaging queue automatically handles requests and feeds them to your printer, email server, or fax server.

- **Campaign Management**

  Measure the impact of your marketing efforts.
  You can easily track each marketing campaign to judge its effectiveness. SmartOffice tracks the number of leads, who they were assigned to, where they are in the sales cycle, and how much business has been generated.

- **Seminar Management**

  Deliver seminars that build your practice.
  Many professionals swear by seminars as one of their best lead-development techniques. SmartOffice can help you plan and manage seminars to ensure results. Coordinate resources, issue invitations and reminders, maintain RSVP and waiting lists, and report customer acquisition by seminar.

- **Telesales/Telemarketing Call Scripts**

  Ensure consistent sales messaging and processes.
  As a tool for developing advisors, you can arm them with intelligent marketing scripts and clear next-steps for each call. SmartOffice tracks call activity, distributes leads, and produces management reports to help measure the effectiveness of your telemarketing efforts.

- **Management Reporting**

  Make more informed business decisions.
  Use standard and custom management reports to better understand where you need to focus your attention. From sales activity to pending cases to marketing results and client satisfaction, you can see what's working and what isn't, and take appropriate action to keep your business on track.

CUSTOMER SERVICES

Superior service starts with knowing your customer

- **Investment Tracking**

  Understand your client's whole financial picture.
  With SmartOffice, you can track permanent, term, and UL policies, annuities, registered and non-registered accounts, GICs, retirement savings, mutual funds, segregated funds, traded securities, real estate, personal property, and other investments. Positions can be listed globally, individually, by household, or by security master, and security prices may be automatically updated via pricing services subscriptions.

- **Policy Tracking**

  Use your knowledge to make informed recommendations.
  Use SmartOffice to track Life, CI, DI, Supplemental Health, LTC, Segregated Funds, and even a variety of P&C coverages. You can view policy information globally or by individual, group, or household, as well as track the purchase or sale of sub-account shares for universal life policies.

- **Household Tracking**

  Get a client view that really works for you.
  Gain a consolidated view of policies, investments, accounts, letters, and policy claims from people who are associated as a family or group of beneficiaries. Get visibility to household income, assets, net worth, and financial goals such as retirement, educational savings, etc.

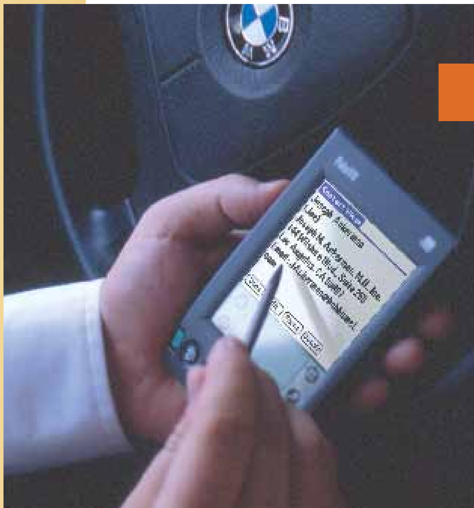
- **Pending Case Management**

  Save time and boost customer service.
  Eliminate manual pending case tracking using carrier pending case updates directly into SmartOffice (when available from carriers). Advisors may soon accept updates through their MGA to see the status of their new business.

- **SmartView for Clients**

  Increase the value of your client relationships.
  As part of your exclusive service offerings, give your clients the power to view their financial portfolio right from your website. You choose the level of client access to holdings, pending case status, and other important client information.

Mobile Computing



SmartOffice – Mobile

Take SmartOffice on the road

Your office is the picture of automation. Your staff is connected. You have customer information at your fingertips. So why is it you end up hitting 'print' in preparation for every meeting outside the office?

Take your office on the road with SmartOffice — Mobile. Using your laptop or mobile device, you can view, add and modify information away from the office, and then quickly and easily synchronize changes when you get back to your desk.

You can also use the Internet or a wireless connection to update your files remotely.

Besides basic client contact information and appointments, SmartOffice — Mobile provides access to your clients' investment and policy information, so you're totally prepared in every meeting. You can even flag correspondence to be automatically sent when you return to the office.

SmartOffice is fully compatible with both most popular mobile devices. And while the notebook solution is a Microsoft® Windows®-based application, it shares a common user interface with the SmartOffice you use everyday.

What Our Clients Are Saying About SmartOffice Mobile

"There aren't many companies out there who really bust their chops and know their stuff. Ebix CRM is different, and I am so excited and pleased about my purchasing SmartOffice. I must admit I was hesitant at first in having my database becoming web based. Now I see this the only way to go."

Wade Stark,
Life and Health Specialist

Getting the most from SmartOffice

SmartOffice is designed with flexible options for data transfer, expert technical support from people that understand your business, and training options to meet the needs of your busy schedule

Setup and Data Services

Our services team can get you up and running fast

- **Data Conversion Services**

  Build trusted relationships.
  Fast, accurate data conversion from your existing software is the key to helping you get the most from SmartOffice right away. Conversions are available for Client Data System (CDS), ACT, Contact Partner, CPU Tracker, Goldmine, Manulife's Client Manager, Maximizer, Microsoft Outlook and CRM, and VirtGate. We can convert your data from most other database systems.

- **Data Import/Export Utilities**

  Import features allow users to easily import Contact, and Lead records. SmartOffice automatically adds entries and contacts, creates call activities linked to specific contacts, and assigns new contacts. Exports are available from any generated list.

Training Services

Get the most from your SmartOffice solution with flexible training options

- **On-demand Online Training Library**

  Get many of the benefits of live, instructor-led training without the cost of a personalized session. Pre-recorded courses — from introductory concepts to advanced concepts — are available on-demand from our online training library.

- **Instructor-Led Online Training**

  This hybrid solution provides a tailored, interactive training experience using distance-learning tools. Students follow along with the instructor from the comfort of their desk or as a group. This option is ideal for periodic refresher courses or as a follow-up to on-site training.

- **Instructor-Led On-site Training**

  Customized training programs from our professional instructors are delivered at your site, and address the features most important to your firm. Single- or multiple-day courses can be designed from our standard curriculum library, tailored to emulate your unique scenarios and business practices. Instructors are available to work with your staff individually and ensure classroom concepts are put into action.

Technical Support Services

Help is there when you need it

- **Telephone Support**

  Unlike many software providers, Ebix CRM offers unlimited access to its experienced, knowledgeable support staff. Our team has been serving the financial services marketplace for over a dozen years. They speak your language, go the extra mile, and have the skills to help solve your issues fast.

- **Email and Fax Support**

  For support issues that don't require immediate attention, Ebix CRM offers both email and fax options. Simply send us information describing your problem, and we will asign the resources you need to solve it. If phone follow-up is required, we will schedule a time that is convenient for you.

SmartOffice is offered both as a software solution installed in your environment or as an online solution managed in our world-class Canadian hosting facility. Either way, your business will benefit from the most comprehensive system available to address the unique needs of your financial services organization.

To learn more about how SmartOffice can help you take your business to new heights of success, visit www.ezdata.ca or call us at 800-777-9188.

ABOUT EBIX

A leading international supplier of On-Demand software and E-commerce services to the insurance and financial services industry, Ebix, Inc., (NASDAQ: EBIX) provides end-to-end solutions ranging from infrastructure exchanges, carrier systems, agency systems and BPO services to custom software development for all entities involved in the insurance industry.

With 23 offices across Singapore, Australia, the US, New Zealand, India and Canada, Ebix powers multiple exchanges across the world in the field of life, annuity, health and property & casualty insurance while conducting in excess of $100 billion in insurance premiums on its platforms. Through its various SaaS-based software platforms, Ebix employs hundreds of insurance and technology professionals to provide products, support and consultancy to thousands of customers on six continents. Ebix's focus on quality has enabled it to be awarded Level 5 status of the Carnegie Mellon Software Engineering Institute's Capability Maturity Model (CMM). Ebix has also earned ISO 9001:2000 certification for both its development and BPO units in India. For more information, visit the Company's website at *www.ebix.com*.

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