

SmartOffice®

For Wholesalers



PROVEN IN PRACTICE

Product Overview

> *Helping financial services wholesalers build channels that produce*

SmartOffice®

Will your distributors produce enough to exceed goal this year?

GET SMART

"At Jefferson Pilot Financial, we rely heavily on independent distribution. The ability of our wholesale team to establish and maintain strong relationships with the firms and producers in our network is key to our success.

We view solutions like SmartOffice to be an absolute necessity, providing the visibility and reach to stay top of mind with our channel, ensure they understand how our products provide superior value for their clients, and to help us deliver the highest levels of service."

Carol Rando
Vice President
Marketing & Distribution
Jefferson Pilot Financial

There's good news in the Canadian financial services industry. With banks, securities and mutual fund dealers, MGAs and various other customer-facing firms now offering a host of financial products, the pool of potential distributors is growing. With the major shift to independent distribution, competition is as hot as ever. And while some organizations look to differentiate based on product selection and price, history has shown that these are difficult to maintain as a competitive barrier.

Does your wholesale team have a plan for winning over producers and distributors — and a method for maintaining their loyalty? With so many alternatives to choose from, the strength of your relationship is the only way to ensure long-term revenue growth.

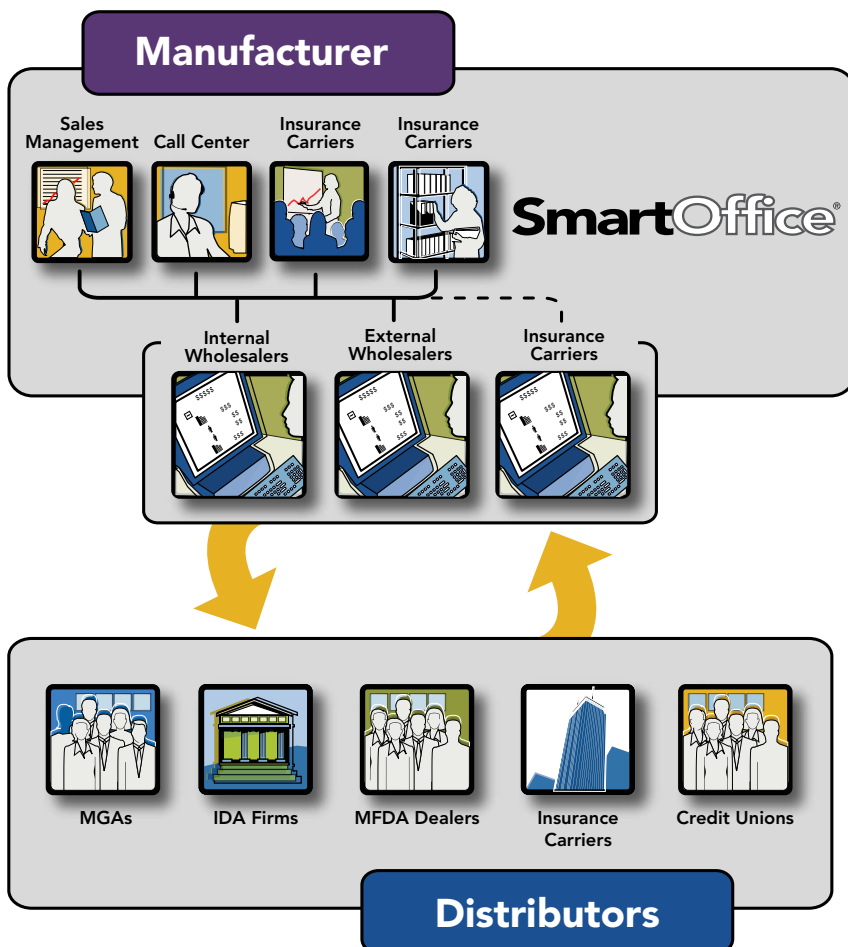
To establish and maintain those strong relationships, you need SmartOffice from E-Z Data. Leveraging nearly two decades of successful use in the financial services industry, SmartOffice is ideal for wholesale teams. It helps you know your customer, deliver high levels of service, and secure a greater share of your distributors' business.

The result: Distribution partnerships that overachieve year after year



SmartOffice helps drive success

by bringing together the tools you need to build strong customer relationships and the data that provides visibility into their production. SmartOffice helps wholesalers:



- > Gain a greater share of the distributors' business
- > Turn your customer database into a valuable sales tool
- > Produce effective seminars and marketing campaigns
- > Deliver an optimal product mix to each customer



SMARTOFFICE MOBILE

Mobile Computing

Take SmartOffice on the road

Your office is the picture of automation. Your whole staff 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?

It's time to take your office on the road with SmartOffice Mobile. Using your notebook or Personal Digital Assistant (PDA), 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, or 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.

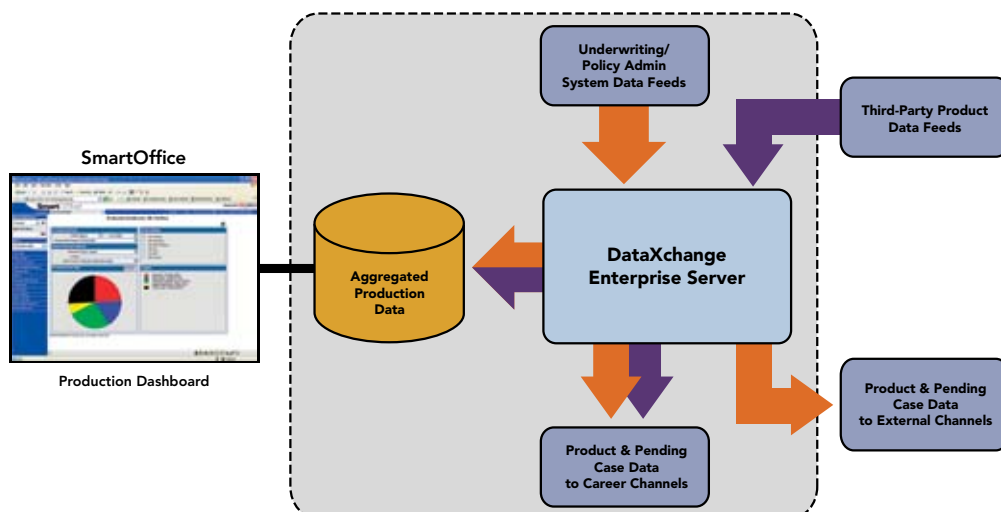
SmartOffice is fully compatible with most popular mobile devices, as well as your Microsoft® Windows®-based notebook.

DataXchange™ Enterprise Server

Simplifies the movement of both legacy and third-party data into SmartOffice, providing end users with a complete view of channel production.

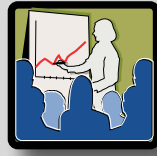
From the channel sales representative to the head of product distribution, getting a top-down view of channel production can be a challenge. Together, SmartOffice and DataXchange Enterprise Server combine to provide visibility into your production numbers

and help your team put them to work. In addition, by utilizing standard data formats like ACORD XMLife, DataXchange simplifies the process of pushing data down to your distributors, helping make your company the easiest to do business with.

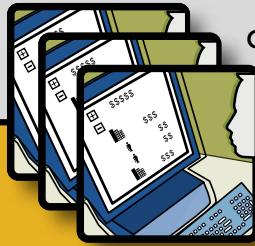


- > Help maintain an accurate view of the producers in your sales channels
- > Get the visibility needed to ensure compliance
- > Help reps strengthen their client relationships
- > Help reps attract and retain more clients — and more assets per client

Manufacturer



Wholesale/
Channel Sales



Permanent, UL, Term
Retirement Savings Accounts,
Mutual & Segregated Funds
Annuities & RRIF



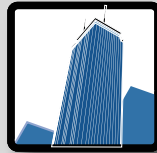
MGAs



IDA Dealers



MFDA Dealers



Insurance
Carriers



Credit Unions

Distributors

SmartOffice
helps synchronize
your channel
distribution
efforts

SmartOffice helps you synchronize the efforts of the entire organization responsible for third-party distribution. Whether growing through internal or external sales channels, it helps the wholesaler stay top of mind with distributors and producers, and deliver the level of service that leads to long-term loyalty and high levels of production.

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.ez-data.com or call us at 866-568-9809 ext.7350.

SmartOffice® Online

SmartOffice Online offers all the benefits of a web-based, enterprise-class CRM solution — without the burden or cost of managing software and servers.

SmartOffice®

SmartOffice combines relationship management, business process management, and the power and flexibility of web-based, enterprise-class CRM to deliver an integrated solution for your business.

SmartOffice® Enterprise

The industry-standard CRM solution for Insurance and Financial Services, *SmartOffice Enterprise* drives the effectiveness of all distribution channels, enabling financial advisors, wholesalers, agencies and dealers to orchestrate their efforts using a single, integrated platform.

