True Practice and Agency Management

SmartOffice

Powerful Practice Management for **Agents** and **Advisors**

SmartOffice is the only cloud CRM solution designed to help insurance agents and financial advisors deliver unparalleled client service, create trusted relationships, and generate more revenue. Our robust, modular platform addresses your practice's immediate needs while providing you with the flexibility to add features as your business expands.

Core Features

- SmartOffice Anywhere lets you access your data anywhere, anytime using any smartphone or tablet.
- Client Tracking helps you manage your clients' personal and household data, send correspondence, maintain a history of all interactions, and sync that data across all of your devices.
- Calendar Management provides powerful tracking of completed activities and unfinished tasks/projects, calendar sync across all of your devices, and easy appointment scheduling through Calendly.
- Dynamic Reports deliver critical business intelligence, with dashboards covering everything from sales and revenue to client birthdays and policy renewal dates.
- Document Storage lets you upload important documents and access then from any device. Support for external services like Docupace and PaperClip are included.
- Form Filling helps you quickly complete forms by pushing SmartOffice data to apps like Docupace and Laser App.
- Microsoft Office/365 integration lets you post e-mail to SmartOffice from Outlook, run SmartOffice reports from Excel, post OneNote notes to SmartOffice, and send SmartOffice correspondence from Word.

Cybersecurity

- Data Security shields your from cyberattacks and helps you comply with security regulations. Encryption, multi-factor authentication, and backups are included. Ebix's security controls have been verified via an independent SOC 2 Type 2 audit.
- SmartOffice Secure is an optional service that protects your users' devices from cyberattacks, enhancing SmartOffice's already robust security features. To learn more, visit www.ebixchoice.com/smartoffice-secure.

Sales & Marketing

- Lead and Opportunity Tracking helps you collect and distribute leads throughout your firm and build standardized sales processes that boost productivity and enforce best practices.
- E-mail Marketing helps you create compelling marketing campaigns that bring in new business. Easily push SmartOffice contact data into apps like Constant Contact, FMeX, FMG Suite, and MarketingPro.

FEATURING

Integrations That Matter

Investments

- **Investment Tracking** helps you manage client accounts and keep positions up to date using data from providers like Albridge, Aqumulate, Broadridge/Investigo, Charles Schwab, DAZL, DST, E*TRADE, Fidelity, LPL, Pershing, Raymond James, Rydex, Securities America, SEI, Sterne Agee, TD Ameritrade, and Walnut Street Securities.
- **Financial Planning and Analysis** allows you to export accounts and positions to popular planning and assessment apps like eMoney, MoneyGuidePro, and Riskalyze.

Insurance

- **Individual and Group Policy/Pending Case Tracking** covers inforce and pending life, disability, medical, LTC, annuity, group, auto, homeowner, umbrella, and other policy types. Manage everything from underwriting to policy service, and get automatic status updates through the DTCC or directly from major carriers.
- **Commission Tracking** helps you calculate expected commissions and reconcile projections with actual payments from carriers. Supports for contracts and user-defined hierarchies is included.

Ultimate Enterprise CRM for **Agencies** and **Broker-Dealers**

SmartOffice was built from the ground up to meet the specialized needs of brokerage general agencies and broker-dealers. SmartOffice's robust financial services-specific data model, combined with its powerful customization and integration capabilities, create a highly tailored, reliable, and scalable solution for your business.

Agency Management

- **Pending Case Management** gives you control over multi-carrier, multi-product new-business processing. Efficiently manage underwriting, generate status reports to advisors, and automatically download case status updates directly from carriers (see the list of feeds and service providers we support).
- **Commission Projection and Reconciliation** helps you calculate commissions due and paid for each policy. Forecast expected commissions and reconcile payments from carriers. Build contracts and track commissions at user-defined hierarchies.

Compliance & Reporting

- **Automated Archiving** of communications, notes, and other interactions between your staff and clients not only helps you provide excellent client service—it also creates a complete audit trail. And it works no matter what devices your employees use.
- **Audit Reports** provide the tools you need to quickly extract and compile notes, documents, and correspondence into a report that's ready to present to compliance officers and auditors.
- **Template Administration** gives the home office control over the templates their advisors use for client outreach, marketing, and other activities.
- **Production Dashboard** provides a consolidated view of production numbers for individual advisors, branch offices, or organizations in a clear, easy-to-understand format.

Workflow Automation & Integrations

- **Workflow System** allows you to standardize and automate sales processes, application/new-business workflows, and other critical activities, making your operations faster and less vulnerable to human error.
- **Data Repository** features allow you to centralize storage of your critical data in one secure location and provide access to your other applications through our integration hub.
- **Data Feeds** from providers of insurance and investment data automatically keep your data up to date, eliminating the need for time-intensive manual updates.

Industry Expertise

- **Expert Consulting Services** from our team of industry veterans help you find the solution that best meets your business needs. Unlike competitors offering overpriced, one-size-fits-all products, Ebix has been designing customized, cost-effective systems for agencies and broker-dealers for decades.

SmartOffice

Pricing to Fit Your Growing Practice

Performance Package	Advisor Package	Producer Group Package
$70/ month	**$135/ month**	**$275/ month**
Single User	Up to Two Users*	Up to Five Users**

- **Microsoft® Exchange**
  - Contact Email & Calendar Sync
- **Microsoft® Office Integration**
  - Word/Outlook/ Excel
- Contact Management
- Calendar and Time Management
- Comprehensive Notes and History
- Document/File Storage
- Mass Communication
- Mobile (SmartOffice Anywhere)
- Insurance Tracking
- Investment Tracking
- Group Insurance Tracking
- Position Level Investment Download
- Dynamic Report Creation
- Letter/Email Template Administration
- Sales/Workflow/Process Tracking
- Agent Commission Tracking
- Lead Tracking and Distribution
- Event Management
- Recruit Tracking

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* $50/month for each additional user

** $40/month for each additional user

Ways to Get Started:

- Visit us at www.ebixcrm.com
- Email us at crmsales@ebix.com
- Call us at 800-777-9188