



**PENSIONS TECHNOLOGY
 PROVIDER OF THE YEAR**

2018

Illustrate Plus
 Simplifying the complexity



Finalist 2017
 Presented by
 The London Institute
 of Banking & Finance
 UK
 FINANCE

FStech
 awards 2018
 SHORTLISTED

Inurance
CIO
 Outlook

TOP 10
 Policy Administration
 Solution Providers - 2016



APENSIONS
 Age
 WARDS
 2018
 SHORTLISTED



A cloud-based illustrations and quotations system that supports new and existing business across all products for life, pensions, wealth management, group and individual business.

Illustrate Plus encompasses life assurance illustrations, wealth management and pension illustrations. Products can be dynamically modified, updated and changed through our Product Development Application (PDA).

Illustrate Plus is driven by variable and configurable calculation parameters. These parameters can be used to define new or modify existing variations. The parameters are stored and structured in the Product Development Application (PDA) database, which is connected to the calculation engine and can be configured and maintained manually.

Illustrate Plus supports full online web enabled quotations for new and existing business provided either through financial advisors, customer services or client self-servicing over the internet.

Online underwriting can also be facilitated either through the inclusion of basic underwriting within the quotations calculations or through interfacing to other external specialist online underwriting solutions. Our illustrations software enables both parties to be involved in setting the assumptions and allows them to get a quick understanding of the financial effects of varying those assumptions on their pension or life insurance policy.

Illustrate Plus is RDR (Retail Distribution Review) compliant and it supports Straight Through Processing (STP).

Key features of Illustrate Plus

SaaS / cloud-based

calculations and quotations for a more efficient and cost effective way of engaging with distribution channels, and new and existing business acquisition

Single illustration solution

across all products, regions & distribution channels

Product agnostic

not tied to product structures - all calculations, features, & structures can be made available to any product configured through the PDA

White labelling

fully supports different look and feel to the front end, products and documentation, all configured through the PDA to support multi company structures through a single solution as outlined below

Multi-channel support

and easily integrated to external systems i.e. supports integration to multiple administration platforms, MI, workflow, online underwriting solutions, documentation engines, and portals

Illustrations capability

extensive library of over 4,500 calculations / methods including extensibility function for client specific libraries

The screenshot displays the 'Financial Planning' interface with a progress bar at the top showing steps: 1. Review, 2. Financial Review, 3. Quote, 4. Application, and 5. Documentation. The current step is 'Quote'. Below the progress bar, client information is shown: 'John / 1 Jan 1969 / Non-smoker & Mary / 1 Jan 1970 / Non-smoker'. There are links for 'adjust benefits' and 'find quote'.

Three policy options are presented in columns:

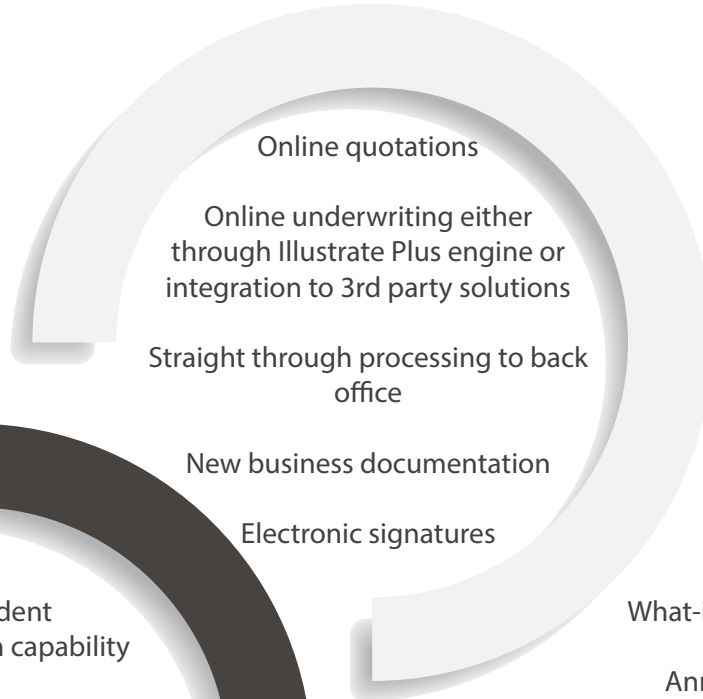
- Option 1 (White background):** For only €32.99 per month. Sustainable for a minimum of 0 years. Life CI: John €176,000, Mary €176,000. Features: Life Cover, Accidental Death, Comprehensive Critical Illness.
- Option 2 (Green background):** Premium Required. For only €32.99 per month. Sustainable for a minimum of 0 years. Life CI: John €176,000, Mary €176,000. Features: Life Cover, Accidental Death, Comprehensive Critical Illness.
- Option 3 (Yellow background):** For only €37.94 per month. Sustainable for a minimum of 0 years. Life CI: John €176,000, Mary €176,000. Features: Life Cover, Comprehensive Critical Illness, Accidental Death, Daily Hospital Cash, Surgical Cash, Weekly Personal Accident, Accidental Injury.

Each option has a 'Purchase' button at the bottom.

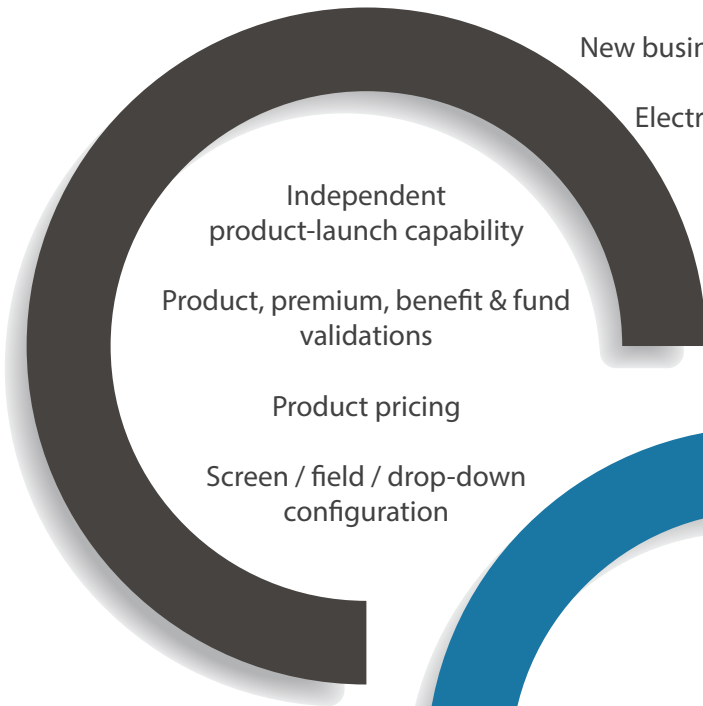
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High-level Functionality

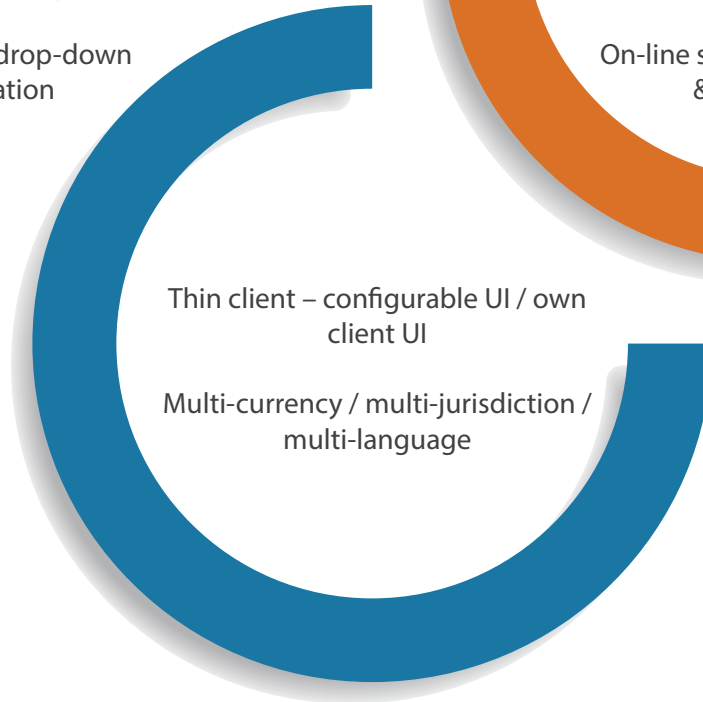
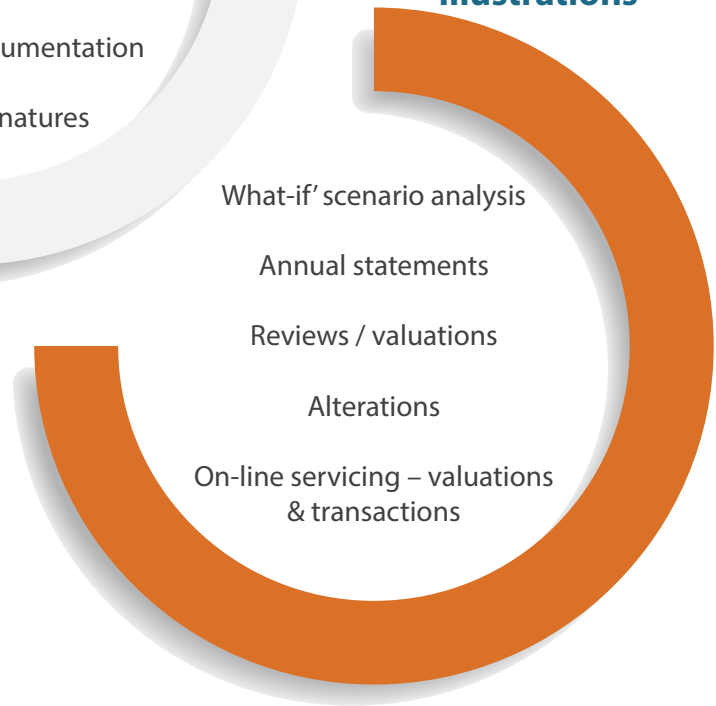
New business illustrations



Self-sufficiency



Existing business illustrations



General