

SmartOffice®

For Wholesalers



PROVEN IN PRACTICE

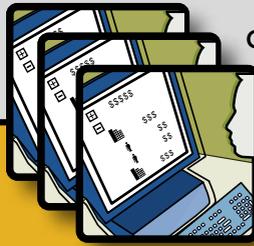
Product Overview

> *Helping financial services wholesalers build channels that produce*

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

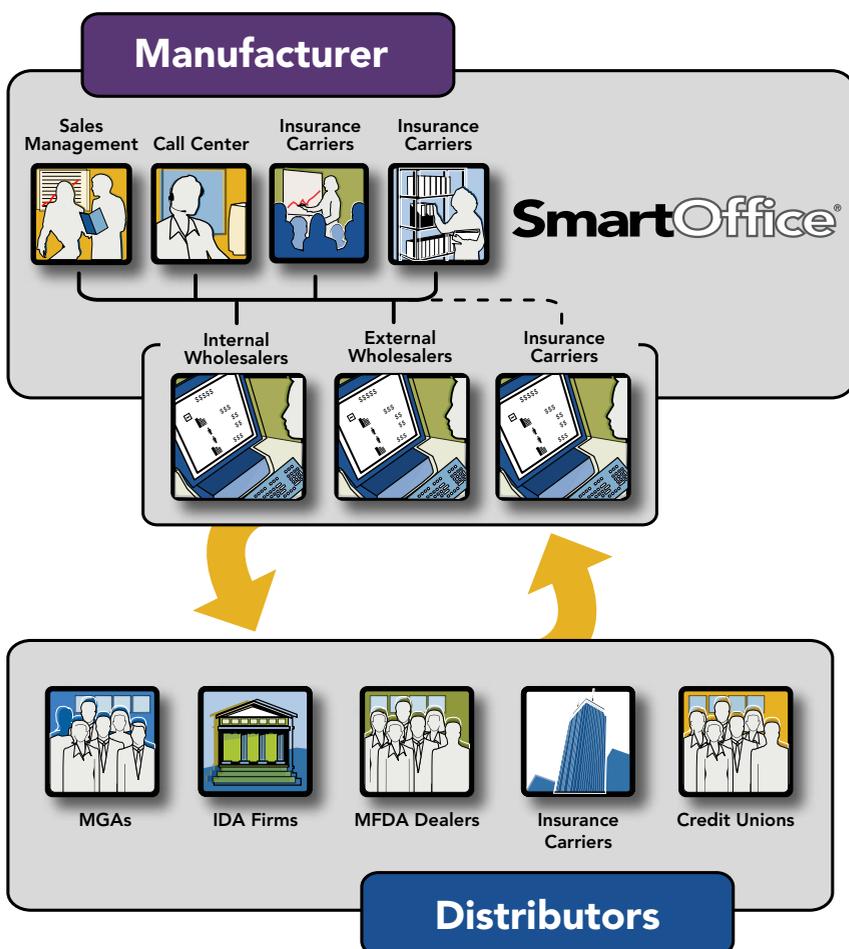
SmartOffice
helps synchronize
your channel
distribution
efforts

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 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

