

SmartLink for Profiles Professional

Streamlining the process of creating financial plans

All too often, you and your staff must spend your valuable time on the administrative chore of data entry. This redundant data entry not only takes away from face time with your clients and other value-added business activities, but it also introduces the risk of errors. For users of Profiles Professional solutions, you can now eliminate unnecessary data entry by using information that is already at your fingertips — right in your SmartOffice database.

An Integrated Solution for Superior Results

Move client asset, insurance and personal information in SmartOffice directly into Profiles Professional at the click of a button!

By integrating SmartOffice and Profiles Professional financial planning solutions, the SmartLink solution streamlines the report building process by letting you populate your client's financial plans with complete, up-to-date information at the click of a button. As a result, you and your staff can prepare for annual reviews more quickly and ensure the accuracy of every report. A consolidated view of your clients' existing portfolios and comprehensive analysis tools and summary calculations makes it easy to identify the need for additional products and services to include in the planning process, and by tracking each client's financial plans in SmartOffice, you can ensure compliance and deliver the excellent service that ensures your position as your clients' most trusted advisor.

DATASHEET

- *Quickly and easily update financial plans*
- *Eliminate redundant data entry and the resulting risk of error*
- *Update all client information in a single location*
- *Free your staff up for client-focused activities*



SmartLink

For Profiles Professional



SmartOffice®

Software designed
for the way you do business

ABOUT EBIX

A leading international supplier of On-Demand software and E-commerce services to the insurance 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.

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you grow your business, call 800-777-9188
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