SmartLink for MassMutual PAAR

DATASHEET

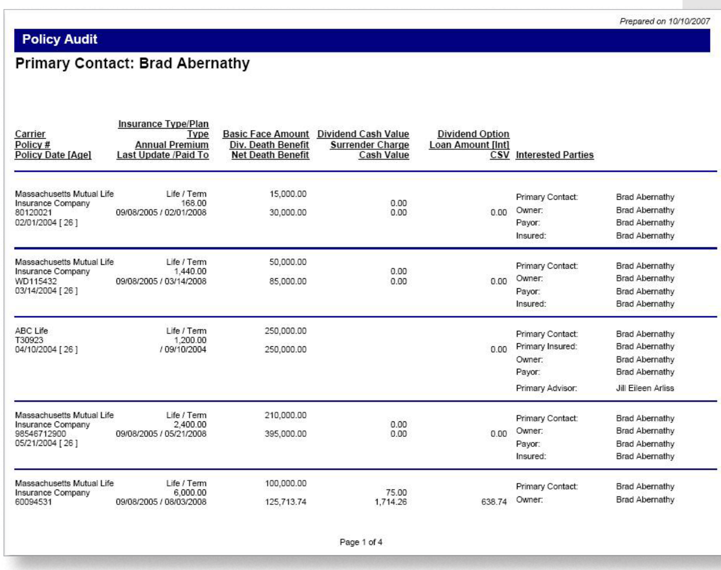
- *Gain visibility into the latest policy and investment data for every client*
- *Increase your reporting capabilities*
- *Track and modify policy and investment data from SmartOffice*
- *Increase productivity by reducing manual data entry*

Managing, tracking, and reporting on your clients' policy and investment data are critical as you strive to grow your business. But loading policy and investment data for your entire book of business can be a challenging and overwhelming task.

SmartLink for MassMutual PAAR, an add-on to Ebix CRM's SmartOffice®, gives you control over this process, enabling you to better manage existing clients. As a fully integrated product within the SmartOffice platform, SmartLink for MassMutual PAAR interacts seamlessly with the SmartOffice contact management and information management features, giving you the power to load policy and investment information and create a wide variety of valuable client holding and portfolio reports.

Leverage the power of automated data entry

SmartLink for MassMutual PAAR gives you the power to upload data files from MassMutual's PAAR system directly into your SmartOffice database. What does this mean to you? Because the solution handles up to 95% of the day-to-day data entry and updating requirements, you can free up your support personnel to service your clients. And with SmartLink for MassMutual PAAR, you'll have access to the most current policy and investment data — so you can deliver an even higher level of value to every one of your clients.



Prepared on 10/10/2007

Policy Audit

Primary Contact: Brad Abernathy

Carrier Policy # Policy Date [Age]	Insurance Type/Plan Type Annual Premium Last Update /Paid To	Basic Face Amount Div. Death Benefit Net Death Benefit	Dividend Cash Value Surrender Charge Cash Value	Dividend Option Loan Amount [Int] CSV	Interested Parties	
Massachusetts Mutual Life Insurance Company 80120021 02/01/2004 [26]	Life / Term 168.00 09/08/2005 / 02/01/2008	15,000.00 30,000.00	0.00 0.00	0.00	Primary Contact: Owner: Payor: Insured:	Brad Abernathy Brad Abernathy Brad Abernathy Brad Abernathy
Massachusetts Mutual Life Insurance Company WD115432 03/14/2004 [26]	Life / Term 1,440.00 09/08/2005 / 03/14/2008	50,000.00 85,000.00	0.00 0.00	0.00	Primary Contact: Owner: Payor: Insured:	Brad Abernathy Brad Abernathy Brad Abernathy Brad Abernathy
ABC Life T30923 04/10/2004 [26]	Life / Term 1,200.00 / 09/10/2004	250,000.00 250,000.00		0.00	Primary Contact: Primary Insured: Owner: Payor: Primary Advisor:	Brad Abernathy Brad Abernathy Brad Abernathy Brad Abernathy Jill Eileen Arliss
Massachusetts Mutual Life Insurance Company 98546712900 05/21/2004 [26]	Life / Term 2,400.00 09/08/2005 / 05/21/2008	210,000.00 395,000.00	0.00 0.00	0.00	Primary Contact: Owner: Payor: Insured:	Brad Abernathy Brad Abernathy Brad Abernathy Brad Abernathy
Massachusetts Mutual Life Insurance Company 60094531	Life / Term 6,000.00 09/08/2005 / 08/03/2008	100,000.00 125,713.74	75.00 1,714.26	638.74	Primary Contact: Owner:	Brad Abernathy Brad Abernathy

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With easy access to the most current investment information for each client, you can easily prepare detailed investment reports for your clients from your SmartOffice desktop.

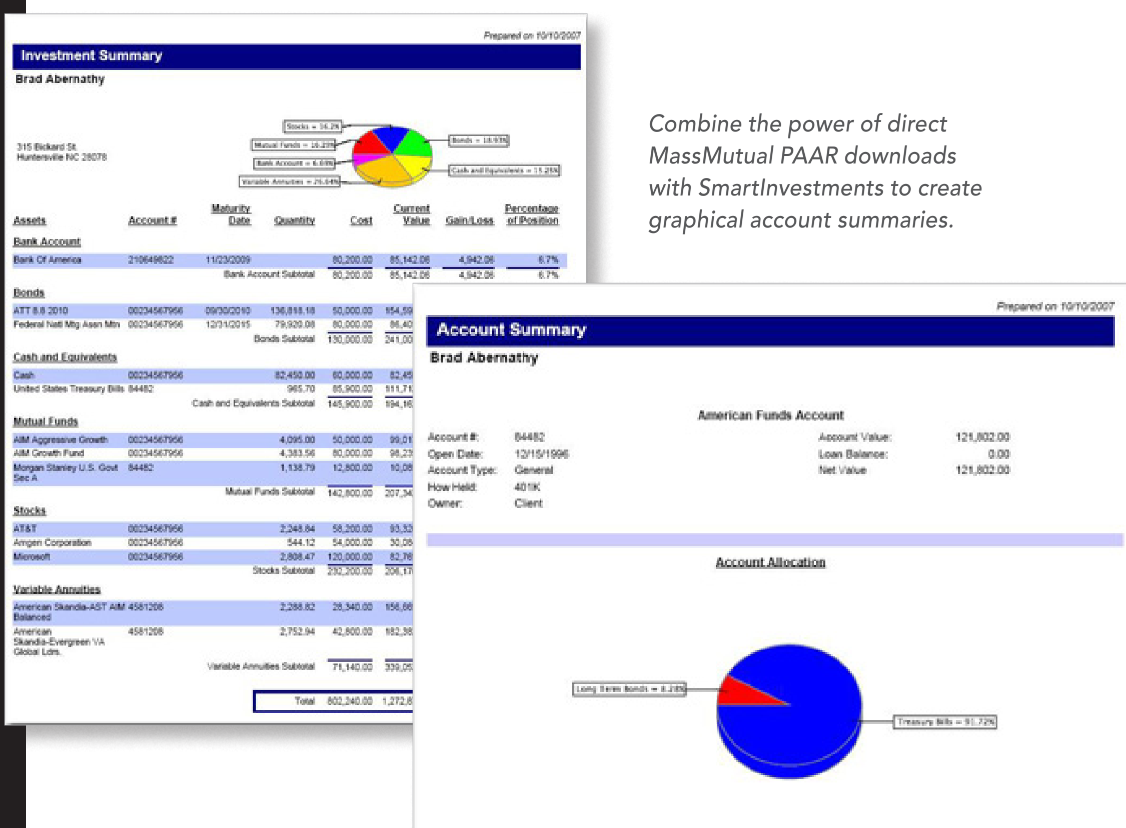
SmartLink for MassMutual PAAR provides these valuable features:

> **Real-time Data Downloads**
> *via automatic Internet updates ensure you have access to the most current policy and investment data.*

> **Seamless Integration**
> *with the SmartOffice SmartInvestments and SmartPolicy modules gives you easy access to information, more reporting options, and access to industry-specific features such as Asset Allocation or third-party applications such as Morningstar — all to make your job easier.*

> **Clear, Concise Reports**
> *enable you to provide your clients with the high quality, accurate reports they expect.*

> **Error-Reconciliation Capabilities**
> *make it easy to identify and correct incoming data errors from MassMutual PAAR.*



Combine the power of direct MassMutual PAAR downloads with SmartInvestments to create graphical account summaries.

Take the next step toward superior service, greater growth, & better business:

- **SmartOffice® Professional Edition for Insurance Agents**
- **SmartOffice® Premier Edition for Financial Advisors**
- **SmartOffice® Premier Edition for Brokerage General Agencies**

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