

24X7 SUPPORT FOR YOUR AGENTS AND BROKERS

channel solutions

- Brokers
- Agents
- Advisors
- Third Party Services
- Collectors

components

- Loans, Leases & Mortgages
- Term Deposits
- Retail Banking
- Investment Management
- Collector

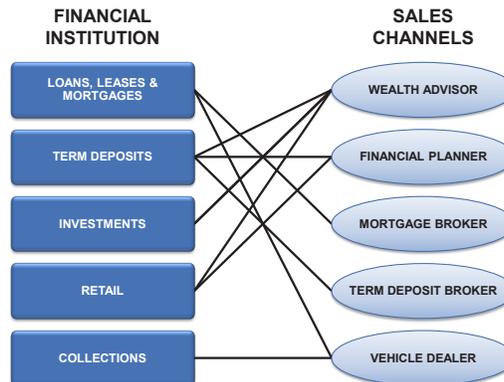
technology

- Secure Sockets Layer
- Customer Branding
- Custom Content and Graphics
- IIS or Apache Web Server
- Windows/Unix/Linux
- Deployment

Many analysts predicted the demise of the sales channel when web technology emerged. They were wrong. Ironically, the web made these channels more efficient. Today, the dollar volume of financial products sold by brokers, advisors, and agents is stronger than ever. Are you providing your channels with the tools needed to help capture more clients? Are you looking to invigorate your channels? Give them access to Portfolio Plus AgentWeb.

Increase Your Agent and Broker Business

Does your organization compete for the business of independent agents? If so, AgentWeb can help. AgentWeb helps attract and retain independent agent business by providing them with the tools and service levels they need. These agents no longer have to wait on hold for a call centre representative to find out the status of an application or a renewal. They simply sign in to a web portal to review the status of any financial transaction they've originated. This self-service approach is a powerful concept that resonates with agents and brokers.



Secure Browser Access

AgentWeb access is controlled through a secure browser-based interface and, as such, can be easily deployed in an intranet, internet, or extranet configuration. You control the access, passwords, and security levels.

Captive Agents Too!

AgentWeb also benefits internal and captive agents. You can provide your captive agents with secure and limited internet access to certain features of your banking system. By providing AgentWeb to a collection agency, you can grant them limited access to the specific data required to help them collect funds that are in arrears and report new data. As such, the latest collection data is available to both the collection agency and the other employees of the financial institution in real time, providing a service and management reporting advantage.

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AgentWeb Choices

Retail

With AgentWeb Retail you have the power to allow captive or third party advisors to manage retail accounts for their clients. AgentWeb can help you attract advisors who cater to high wealth clients, providing you an opportunity to further leverage this channel to sell other financial products.

Term Deposits or Investments

AgentWeb Term Deposits and AgentWeb Investments allow you to provide advisors access to your financial products. These advisors can easily apply for, sell, and renew financial products from your institution. If you're looking for a way to make your investment and term deposit products easier to manage for brokers, AgentWeb is it.

Loans, Leases & Mortgage

Lending brokers want to be able to apply for and renew loan, lease, and mortgage products easily. AgentWeb makes it easy to do. Brokers can also sign in to the system to determine when their various lending products are renewing.

Embrace and Extend Your Brand to the Sales Channel

With Portfolio Plus AgentWeb you're not only offering your channels the tools they need to make it easier to do business, you're also extending your brand into their daily lives. With AgentWeb you have complete control of your branding. When you deploy AgentWeb you choose the logos, page colors, fonts, line spacing, and more. AgentWeb uses the power of cascading style sheets to make it easy to manage and change your design as required.