

# RMS InControl™ Annual Newsletter

## New compact 'Self-Employed' Advice Module cuts time in half!

Feedback used to be that while good for larger multi-shareholder businesses, the InControl™ business risk planning module was just too complex for the 300,000 self-employed business owners in the market, that the process took too long to complete, and the SOA Plan too long!

We listened, and launched a brand new 'Self Employed' module for this class of client about one year ago, and it's been a huge success! It combines both the business and private data capture and needs discovery into one simple seamless process, and writes a smaller more straight forward SOA Plan document.

## New Automated 'Authority to Disclose' saves even more time...

InControl™ now optionally writes an 'Authority to Disclose' document ready for your client to sign on screen (if you have touch-screen technology) and send to their current insurers to uplift policy data.

This is just another example of the levels of automation that we're bringing to the advice and sales process.

## New 'Needs Prioritisation' in 1 quick easy step...

We've launched a much asked for new step in the InControl™ sales process – an electronic 'Managed Position' and 'Plan Implementation' Planwriter!

By allowing your client to electronically prioritise their needs and objectives, this facility ensures that the final insurance recommendation fits their budget perfectly, and the InControl™ Planwriter then records the variations and emails out a 3 to 4 page Addendum that includes all implications of those variations. Great for your LRAC\*!

\*Acronym for the combative defensive strategy practiced by all smart advisers known as long range arse covering

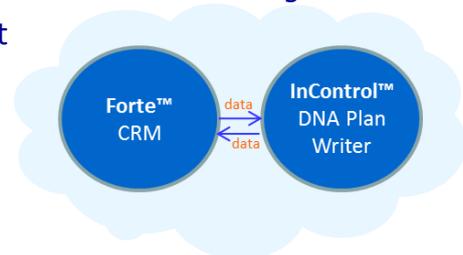
## New CRM Cloud Integration eliminates double handling...

RMS teamed up with FAB Forte CRM late in 2012 to data-integrate the InControl™ DNA Planwriter and the Forte CRM Business Console in a private cloud, thereby significantly reducing the level of data handling for Advisers who subscribe to both systems.

Consequently, RMS can now offer a fully data-integrated CRM Business Console and DNA Plan writing solution.

Simply, the Forte CRM and InControl™ applications now share client and policy data back and forth between themselves in the cloud. Whatever data you put into one – appears in the other and visa versa, completely eliminating one level of double data handling forever!

Forte CRM is a user-friendly, powerful business and contact management tool. It is 'hybrid', meaning it's a cloud and local-windows app that operates both online in the cloud and locally at the same time, automatically backing up all your emails, diary appointments, contacts, and client files etc., yet, can be used offline anywhere, anytime - while flying for example.



[Contact us](#) or call Chris or Katrina on 64 7 3480 679 for further details on our early bird offer today.

## New User Defined Settings mean increased flexibility...

We continue to increase overall user-flexibility through developing self-configuration tools with which users can tailor the InControl™ application to suit their personal style, tastes and requirements – all without detracting from the overall inherent best practice workflows.

These include:

- Multi-layered screen and form colour options;
- Optional imbedded power-point sales presentations;
- Imbedded 'personalised' Disclosure Document & Company Profile;
- Alternative 'screen-versions' and much more...

## Exciting new eQuote Portal & Fidelity Apollo integration...

We're proud to announce that we have recently launched the new automated eQuote Web Portal and Fidelity Apollo integration to stage 1.

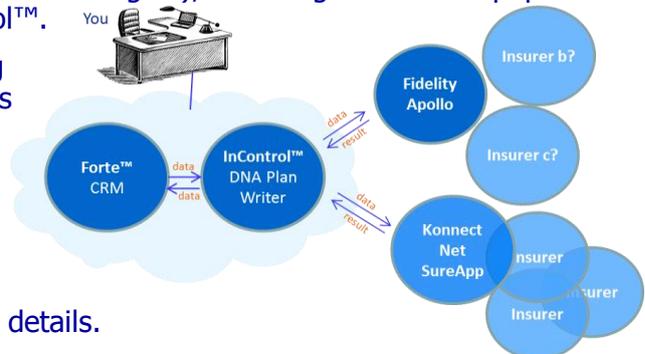
This exciting new development is set to automate obtaining real quotes and launching eApps with those insurance companies progressive enough to support this initiative. Fidelity is the first insurer to do so, and with stage one (of 3) now launched, InControl™ now:

1. Calls Fidelity's Apollo Adviser Web Portal in the cloud;
2. Automatically populate Apollo with the client details;
3. Displays Apollo inside InControl™ ready to complete your quote.

Stage 2 of the project will be to auto-populate Apollo with each client's specific insurance requirements (as calculated by the InControl™ DNA Engine), and stage 3 to auto-populate and lodge Fidelity's eApps from within InControl™.

All this means that InControl™ users are racing towards being able to effortlessly source quotes and lodge insurance applications - all at the push of a button from within InControl™!

The only remaining question is; which will be the next progressive insurer to integrate with InControl™ ...?



[Contact us](#) or your Fidelity Life BDM for further details.

## 'Local-Windows Synced App' soon to make client meetings a breeze!

Many InControl™ users report that Telecom and Vodafone network instabilities can at times make client meetings a challenge when using InControl™ online, not to mention that they often forget their online-passwords too!

Well, we listened, and we're now only weeks from launching a brand new 'Local-Windows Synced App' with which to run client meetings and the Discovery offline, then sync with InControl™ in the cloud when back at the office to complete the advice and plan writing.

This application will be available to all InControl™ users to download from the internet and will work on any Windows Laptop or Tablet, or Apple MAC with parallel operating system.

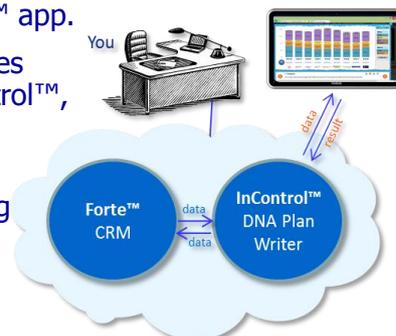


## QuoteMonster integration to save even more time, and your butt!

We are in the final stages of negotiating terms with Russell Hutchison from QPR Ltd to make QuoteMonster available to InControl™ users via the InControl™ app.

When complete, Advisers will be able to source indicative quotes from QuoteMonster at the push of a button from within InControl™, as well as subscribe to Russell's Qualitative Product Research (QPR) - an absolute must for all Adviser's LRAC!

This will not only eliminate yet another layer of double handling and save Adviser's time, but support their recommendations and enhance their value proposition to clients!



## Exciting Hardware Advancements make for smart use!

I recently quit using desktop / laptop technology and acquired the Windows 8 'Acer Iconia' Tablet and Microsoft Bluetooth 'Wedge Mobile Keyboard and Mouse' combo illustrated below. And I *negotiated* a good deal with Harvey Norman Rotorua too - \$1,620 all up including 4 years extended warranty.

The Acer Iconia is a top-end robust, good looking high spec tablet with a large 11.6 inch screen, and comes standard with a really cool 'desktop docking-station' (not shown), and smart fawn leatherette cover that back-folds into a stand for your client meetings (as illustrated). The Microsoft Bluetooth Wedge Mobile Keyboard and Mouse are totally cool too – very smart and compact enough to slip effortlessly into your bag or even coat pocket, yet large enough to use with ease - even despite my fat digits!



Especially in light of the coming 'sync'd local-windows App' which RMS is about to launch, we recommend Windows Tablets over iPads. Unlike iPads, Windows Tablets are fully fledged computers, and there is now an abundance of them available from most or all major retail outlets priced from as little as \$495 all the way up to top spec'd machines like the Acer Iconia.

In closing, all of these developments not only combine to represent major milestones for RMS, but most importantly, for financial advisers who demand the same exacting standards of their technology provides as they themselves provide their clients.

And we're big on independence too! FAB Forte, RMS InControl™ and QuoteMonster are All owned and controlled independently of Life Insurance companies and NZ Adviser Dealer Groups, preserving your independence, integrity and business continuity.

Thank you for taking the time to read this update and we look forward to hearing from you if you wish to discuss any of these developments or how the Forte/InControl™/QuoteMonster combo package could save you time, keep you compliant, and make you more money.

[Contact us](#) or phone Chris or Katrina on 64 7 3480 679.

Best wishes and good selling, Chris and Katrina Louisson.