

**The UK's number
one online
sourcing portal.**

The Exchange
iress.com/the-exchange



Tell me how it will help me

The Exchange is the market leading online quote and apply portal for financial intermediaries. It makes finding and applying for the right products easy, helping you find the right solutions for your clients.

Tell me what it actually does

Our web-based software gives you the ability to research, quote and compare a client's protection and retirement needs across the market.

You can review your client's protection needs easily and maximise how products are packaged together by comparing single and multi-benefit products side by side.

The Exchange speeds up applications and helps to reduce errors via seamless data transfer with pre-populated applications—all at the touch of a button.



Can you break it down for me?



Extensive market coverage

The Exchange works alongside all of the UK's major product providers and is the market-leading portal for financial professionals, powering 245+ million quotes and 700,000 new business transactions a year. So you can have peace of mind that you are offering the best advice and have evidence to support your recommendations.

Extensive product coverage

Protection:

- Term assurance (life and critical illness)
- Income protection
- Business protection
- Whole of life
- Multi-benefit products

Retirement and savings:

- Annuities
 - Equity release
 - Personal pensions
 - Investment bonds
-

Real-time, accurate quotes

Quotes and illustrations are produced in real time, direct from providers, so they are accurate and tailored to each of your client's specific needs and circumstances. All quote data is stored for up to 30 days and is easy to retrieve and review.

Multi-benefit & multi-policy quotes

Save time and increase protection sales by quoting for up to five benefits at once. The Exchange also allows comparison of single-benefit products alongside multi-benefit products, in a single view.

Reliability

The UK's longest established portal with a proven, stable service—availability at 99.95%

Integration with CRM software

The Exchange has integrations with many industry-leading CRMs, however, you can connect your own CRM via application programming interface (API) options—designed to support your organisation's needs.

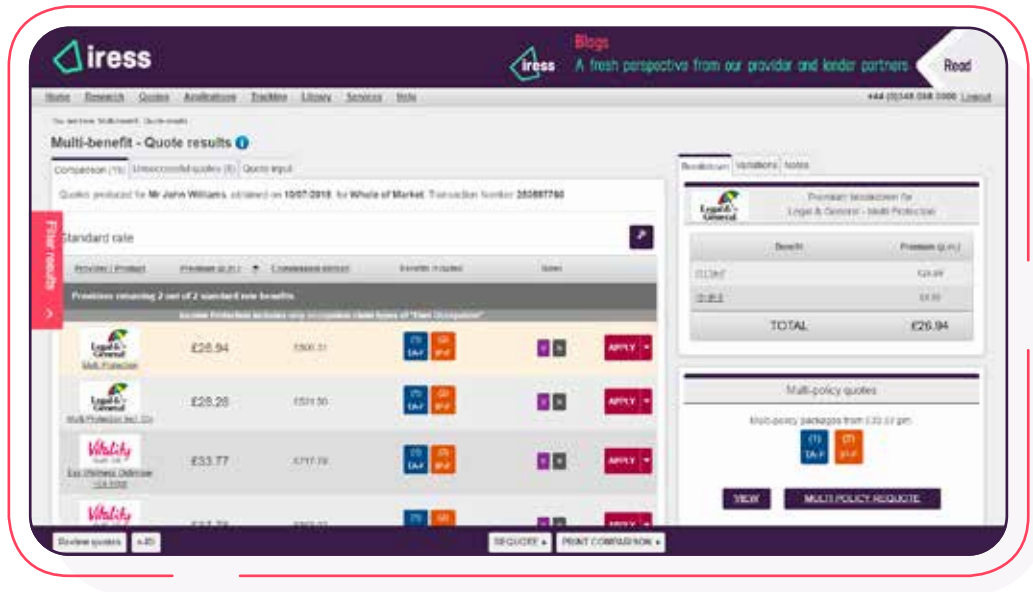
Innovation

With a comprehensive development roadmap, The Exchange is continually evolving to support changing market and customer needs. Some examples include BMI options to provide partially underwritten quotes, better product clarity with the introduction of features and streamlined applications with 'buy-now' products.



With support and expertise from Iress, we have integrated The Exchange into our existing CRM system and deployed Iress to our 350 advisers.”

London & Country



Automatically compares single-benefit against multiple-benefit products on a single screen.



Consumer quote plug-ins

Improve your lead generation capability and reach with a simple plugin that can display quotations on your website.

Network friendly configuration

Our onboarding team can set up preferred provider and product panels, saving you time and streamlining your processes.

Your quotes can be sourced whole of market or on a restricted panel basis, so they reflect your commission model and underwriting criteria.

Compliance and regulatory updates

Our ongoing investment in The Exchange ensures that it receives the latest compliance and regulatory updates.

Integrations with other software and services

Electronic identity checking (EiD&V)

The Exchange's identity checking service is provided by GBG, the global leader in identity data intelligence.

Product research

Integrates with Synaptic, a leading research tool, across life, pensions and investments.

Administration

Integrates with LifeQuote so you can protect more clients, reduce administration burden and save time.

Give me six reasons why I should use it

1

Comprehensive

Extensive market coverage for protection, annuities and equity release.

2

Fast & accurate

Real-time, premium information.

3

No re-keying

Enter client and quote details only once. Applications are pre-populated—reducing errors and saving you time.

4

Compliance

Offer the best advice and gain the evidence you need to support your recommendations.

5

Reliable

The UK's longest established portal, with a proven, stable service—availability at 99.95%

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Value

Unlimited 24/7 access, with an extensive range of support tools, from only £10 per month.

The screenshot shows the iress website interface. At the top, there is a navigation bar with the iress logo, a 'Blogs' section with the text 'A fresh perspective from our provider and lender partners', and a 'Read' button. Below the navigation bar, there is a main content area titled 'The Exchange - Quotes'. On the left, there is a sidebar with navigation options: 'Protection' (with sub-options like 'Protection package (Menu plans)', 'Term & Critical illness', 'Business term (Critical illness)', 'Whole of life / Over 50s', 'Income protection'), 'Retirement' (with sub-options like 'Annuities', 'Pensions', 'Equity release'), and 'Other' (with sub-options like 'Bonds', 'General insurance', 'Referral services'). The main content area contains a form for requesting a quote, with a 'Read' button and a 'Review quote' button. A table of 'Recent quotes' is also visible, with columns for 'Client', 'Product', 'Reference', and 'Date'.

Clean, clear & easy to use with live instant quotes.

What about service and support?

We understand providing great service and support goes hand-in-hand with delivering great software.

We pride ourselves on our thorough and timely implementations, reliable and scalable hosting services, robust back-up and recovery procedures, and ISO/IEC certified information security management.

Our expert-led support team, training programs and online user community all help our users get the most out of our software.

How does Iress stack up as a technology partner?

Every day, more than 9,000 financial services businesses use our software to make better decisions and deliver better results. We know they don't just expect software that works, they also want a technology partner that works with them.

Leveraging our industry knowledge and global experience working with clients just like you, we design, develop and deliver creative, reliable software that does what you need it to.

At Iress, we believe technology should help people perform better every day.



iress.com

Australia - Asia - Canada - New Zealand - South Africa - United Kingdom