

# THE BUGLE



Don't forget to check in to the Account Manager Hub - [Click here](#)

Monday 5th December

## Investments

### DUAL RETURN - €180K AM/BDM race has started

- **Aim is for each AM/BDM to generate €180K** of business across all their panel...4 AM/BDMs have hit the minimum mark already and are pushing on with more cases.
- **UPDATE - Loyalty bonus** – Any business which is coming from another maturing bond with Irish Life gets an extra 0.5% allocation for the client. That's 101.5% allocation and a market leader
- A number of AMs have come to me to say they are working on some big cases **however don't forget the small €10K+ cases**...enough volume here and you start to make up ground very fast. 5 €20K cases and you have €100K already, the smaller the case the easier the sale usually is. This is an area BCP have been particularly good in.



## Marketing

### IBA Survey – completed surveys down from last year...

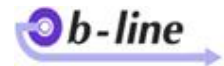
We know that only 34 brokers have completed the survey ..... 12 fewer than last year ...  
Now is the time to confirm with each broker – **“Have they voted”** ..... rather than –  
**“Will they vote for us”**.



## eBusiness

### Link straight from BLINE to Pension Planet without having to log in to Pension Planet

**We have had a very low take up on this handy feature (less than 30 users).** Over the course of the next two weeks, the eBusiness team will be emailing brokers in batches of 200 a day to advise them of this facility and how to activate it: the broker must contact service desk and have his/her pension planet ID verified and added to his/her b-line logon record.



## Pensions

### Two key messages for your brokers this week from Self Invested Fund:

1. EBS 5.33% AER rate available until 16<sup>th</sup> December – [click here](#)
2. BCP & Wealth Options trackers closing this week – [click here](#)



#### Complete Solutions Products available for these investments are:

- Retail Buy Out Bond
- SP & TV's into Personal & Company Pensions (CS 1 & CS 2)
  - ARFs (1 & 2)

#### Income payable to broker:

- Up to 5% commission available (plus trail options)
  - 100% net to client
  - 1% AMC