broker360
model portfolio builder

Irish Life

WHAT DO YOU LOOK FOR WHEN CHOOSING A RISK PROFILING TOOL?

- **CONTROL**
  You want the control to choose the asset mix to ensure it matches to your clients risk profile.
- **INDEPENDENCE**
  A process that you feel comfortable to stand over and recommend to clients
- **RISK SCALE**
  An internationally recognised risk standard, 1 – 7 risk scale
- **COMPLIANCE**
  A process that ensures your recommendations is recorded and matches the clients risk profile
- **COMPREHENSIVE**
  You want a tool that pulls together a comprehensive report, individualised to your clients which also incorporates factsheets, rather than having to log on to separate websites for factsheets.
- **CUSTOMER FRIENDLY**
  A process that complements your sales process and can be used in front of your clients.
- **SPEED**
  Your time is precious; you want the option to determine the time it takes to complete a report
- **MOBILE**
  You do not want to be tied to your office, accessibility when and where YOU want.

The current offerings in the market are frustrating as many of the tools deliver a number of the requirements above but still leave you to seek out the outstanding items to complete the full client report.

Irish life is delighted to introduce Broker 360, the only tool in the market that allows you to pull together all your requirements in a simple and easy to use format.

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IRISH LIFE'S
MODEL PORTFOLIO BUILDER

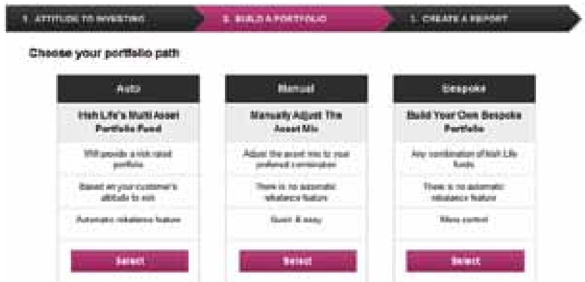
Step 1
What is your client's attitude to investing?

You can either select the risk rating directly for your client or else rate your client's risk using our Risk Questionnaire from eValue*

Step 2
Build a portfolio for your client

This allows you to choose from one of three options:

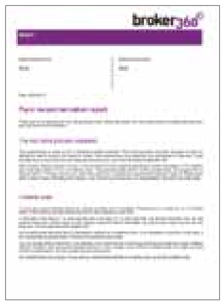
1. Choose the appropriate Multi Asset Portfolio to suit your client's risk rating
2. Adjust the asset mix yourself to construct a portfolio for your client
3. Choose from any of Irish Life's range of funds to build a bespoke portfolio

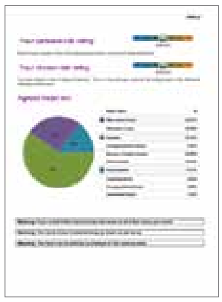


Step 3
Create a short report for your client

This report will explain the risk rating process and the 1-7 volatility scale.

It will then show the asset split you have chosen for your client and allow you to print fund factsheets for them.





eValue FE's credentials

- Originally part of Towers Watson (formerly Towers Perrin) and now an associated company of FE
- Nearly two decades of experience helping individuals understand investment risk reward trade-offs – longer than anyone else in the world
- Provides powerful analysis, financial planning, forecasting and reporting solutions for the financial services industry
- Well established track record of innovation and thought leadership
- Used by more than 80% of UK Financial Institutions and its software is accessed by over 50% of the adviser market

Why not put the new Broker 360 tool to the test. Simply log on to www.bline.ie and experience just how simple and comprehensive it really is.

For further information, or a demonstration – simply talk to your account manager

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