

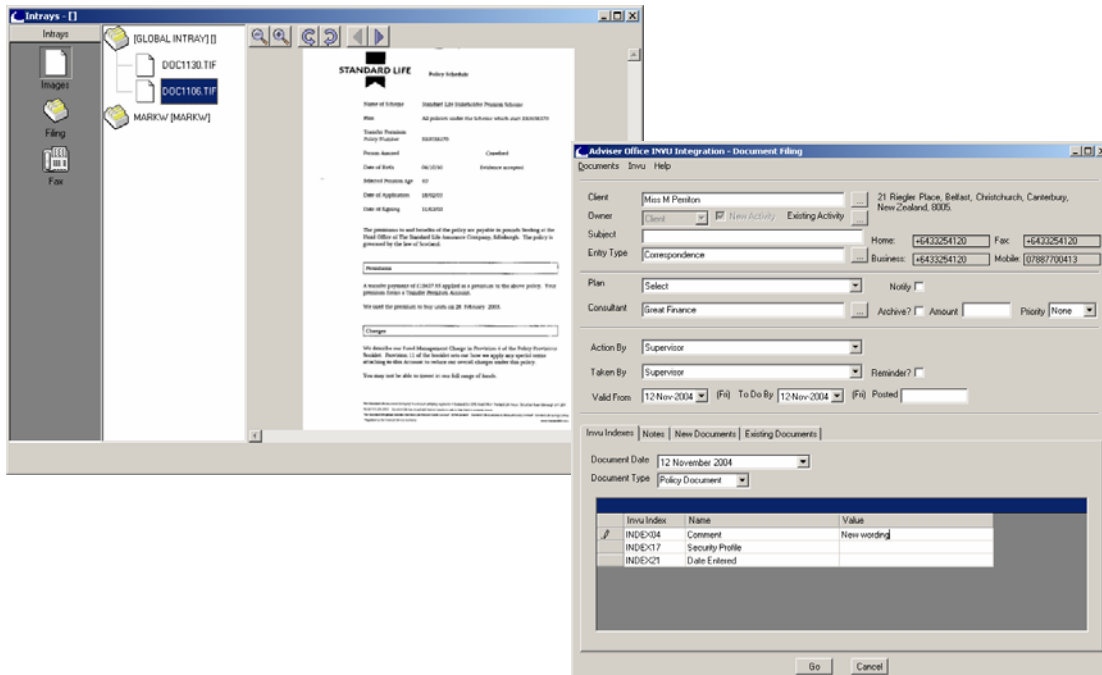


Invu is an affordable, easy to use, highly effective document management system. Invu enables IFA's to control all documents compliantly, share information, increase productivity and archive securely ... and with an average return on investment of just 5 months.

Invu has now been fully integrated with 1<sup>st</sup>'s Adviser Office by Lindenhouse Software. This enables users of Adviser Office to seamlessly store and access documents in Invu while working in their usual Adviser Office interface. Adviser Office references and activity entries are maintained but with the added searching and security benefits of the Invu document management solution.

### Invu: Adviser Office integration explained:-

Documents are scanned through a high-speed, low cost production scanner and routed to individual or group electronic Intrays. These documents can then be selected and attributed to the relevant client record within Adviser Office. This process will produce an activity record within Adviser Office which as well as providing a reference to the activity also provides a link to the document.





### Retrieving documents from Adviser Office:

Once documents are stored into Invu, they can be quickly retrieved directly either by the individual activity entry or by calling the whole client file from Adviser Office. This initiates the powerful Invu search capabilities and allows you to find your document immediately saving you hours of time!

The screenshot displays the Invu software interface. On the left, the 'Activity Review' window shows client details for 'Penton M Miss' and a list of documents, including a 'Correspondence' document dated '12 Nov 2004'. Below this, the 'INVU Query - All' window shows a search results table with columns for Document ID, Rev, Entry Date, Type, and Doc. The table lists three documents: MPPu14616, MPPu14617, and MPPu14627.

In the center, an 'INVU Image Viewer' window displays two pages of a document. Page 1 is a 'STANDARD LIFE' document, and Page 2 is a 'Policy Schedule' document. The 'Policy Schedule' document includes the following details:

STANDARD LIFE		Policy Schedule
Name of Scheme	Standard Life Stakeholder Pension Scheme	
Plan	All policies under the Scheme which start K83038370	
Transfer Premium Policy Number	K83038370	
Person Assured	Crawford	
Date of Birth	06/10/50	Evidence accepted
Selected Pension Age	60	
Date of Application	18/02/03	
Date of Signing	11/03/03	

Below the policy details, there are sections for 'Premiums' and 'Charges'. The 'Premiums' section states: 'A transfer payment of £15627.85 applied as a premium to the above policy. Your premium forms a Transfer Premium Account. We used the premium to buy units on 28 February 2003.' The 'Charges' section states: 'We describe our Fund Management Change in Provision 4 of the Policy Provisions Booklet. Provision 11 of the booklet sets out how we apply any special terms attaching to this Account to reduce our overall charges under this policy. You may not be able to invest in our full range of funds.'



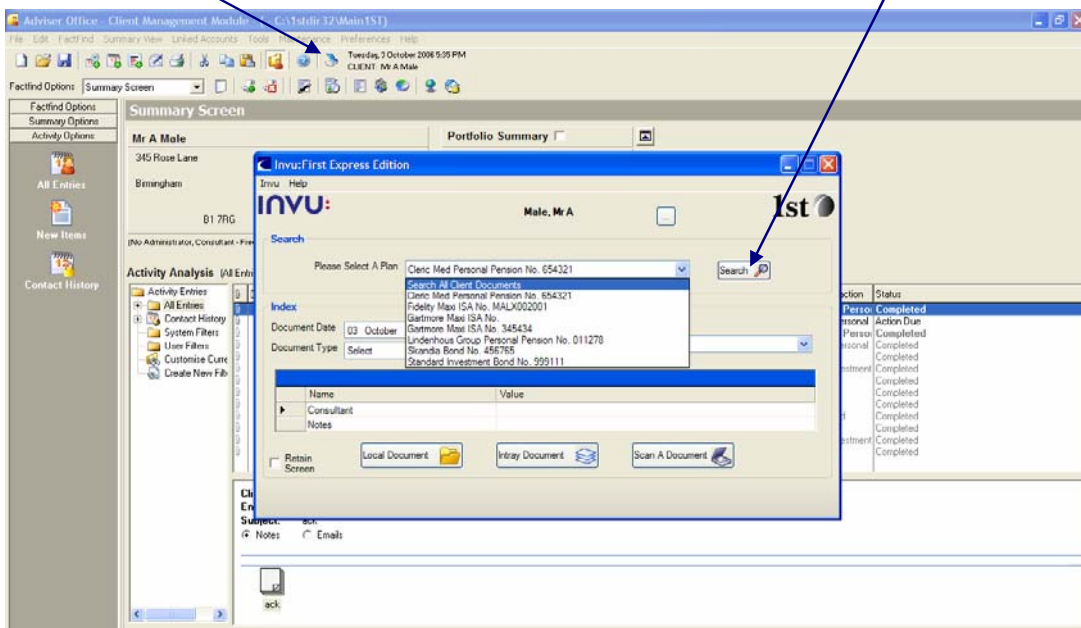
## Invu AO Express!

As well as the above structured method of creating activities whilst filling documents we have now developed a simple express way to file your documents into Invu whilst using AO client and plan references.

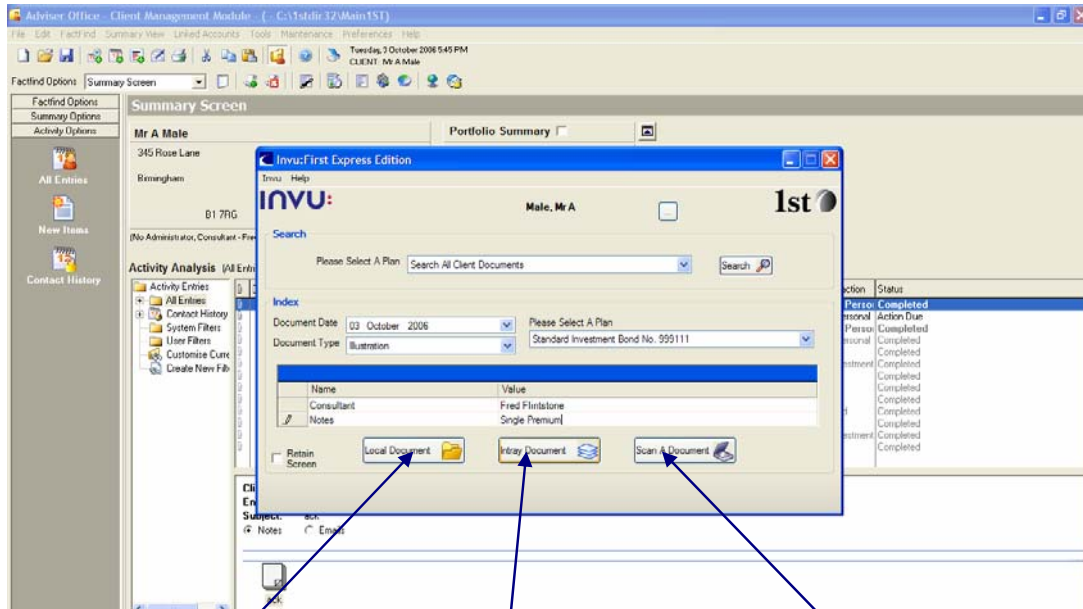
## Searching

Angel icon activates Invu AO Express Screen

Search Button retrieves all or plan specific documents stored in Invu



Filing



Access to local documents for indexing to Invu

Access to scanned documents in Invu Intru for indexing

Direct access to Scanner for immediate indexing of documents to Invu

This simple or express approach allows both indexing and searching from one simple screen. Documents are stored and retrieved either by client and or by plan references.

**INVU:**



**Immediate benefits:**

- **Immediate retrieval of documents:**

Information is easily shared; personnel save six weeks per year and increase their productivity.

- ***Competitive-edge:***

By offering a superior level of client service.

- ***Space saving/Storage costs:***

Moving business premises can be avoided. Space freed up by scanning could house a productive member of staff therefore increasing profitability.

- ***Compliant/Legislation friendly:***

With full audit facilities documents are now fully compliant and can adhere to many legislation-governing bodies.

- **Disaster recovery contingency:**

Invu provides the facilities to produce a full back up of all of your paper based documents.