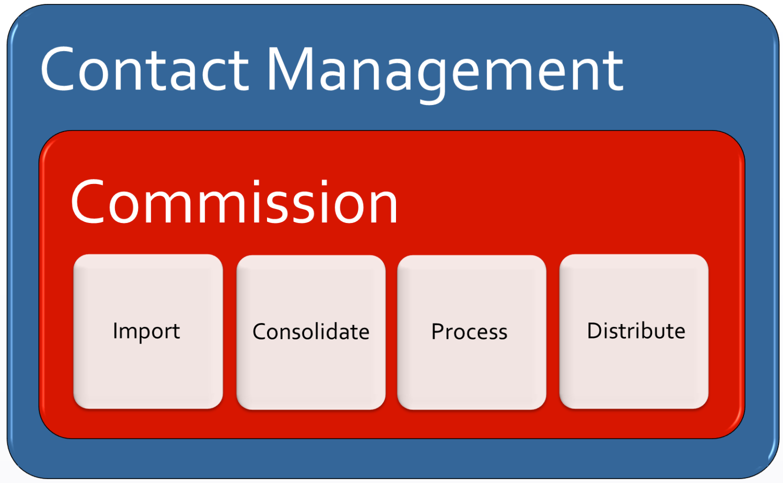
TEESSEN CONSULTING



flexible solutions for your business needs

TEESSEN CONSULTING PROVIDES A TOTAL END-TO-END SOLUTION

COMMISSION ADMINISTRATION

The Insure-IV suite now includes all the functionalities for a comprehensive commission management system. Underpinning all the line-of-business modules, it allows you to specify commission rules from a short term policy to a funeral plan.
The powerful analysis- and reporting tools provide you with a complete picture of your commission and fee income and adds to better decision making.

Flexible mapping tools allow integration to a vast number of commission file- and statement formats. We currently import commission data from most of the product providers in the financial services sector to provide you with a consolidated view of commission and fee transactions per policy, broker and product. You can process and share this commission with multiple parties based on flexible, time based sharing rules.

- Calculate commission on various levels using user specific criteria
- Split commission to multiple parties
- Import commission data from Excel- and CSV files
- Send recipient commission statement directly to recipients or provide them access to an online portal
- Create powerful management reports
- Integrate to payroll- and payment systems
- Include all CRM functionality
- Online access for Recipients to their commission statements.

FEATURES

- BROKERHOUSE STRUCTURE
- BROKER CONTRACT MANAGEMENT
- TEMPLATE BASED SPLITTING RULES
- EXPENSE DEDUCTIONS
- RETENTION POLICIES ON PAYOUTS
- BANK STATEMENT RECONCILLIATIONS
- CUSTOMIZED COMMISSION STATEMENT AND PAYMENT ADVICE
- COMMISSION AND FEE TRACKING
- PRODUCT AND PROVIDER SEGMENTATION
- IMPORT/EXPORT
- AUTOMATION & WORKFLOW

REPORTING

- ALL OUR REPORTS INCLUDE A POWERFULL REPORT WRITER AND ANALYSIS TOOL ALLOWING BUSINESS TO BUILD THEIR OWN REPORTS AND CREATE POWERFUL MANAGEMENT REPORTS.
- WE PROVIDE PROFESSIONAL SERVICES TO TRAIN AND ASSIST IN REPORT WRITING.

CONTACT

- FOR MORE INFORMATION ON ANY OF OUR PRODUCTS OR SERVICES:
  - 27 (87) 550 1427
  - www.tconsult.co.za

FLEXIBLE IMPLEMENTATION

We offer a selection of application modules. Our Consultants will gladly discuss your specific requirements for a customized solution that meets your business requirements.

INFRASTRUCTURE

We provide you with the choice of a local Windows client-server based implementation or a Web application or both. We can advise you on the most suitable solution for your business.

TRAINING & SUPPORT

Effective product training are provided at your premises on the data already familiar to your team.
Our support team are available to assist when needed. We also offer real time online support.

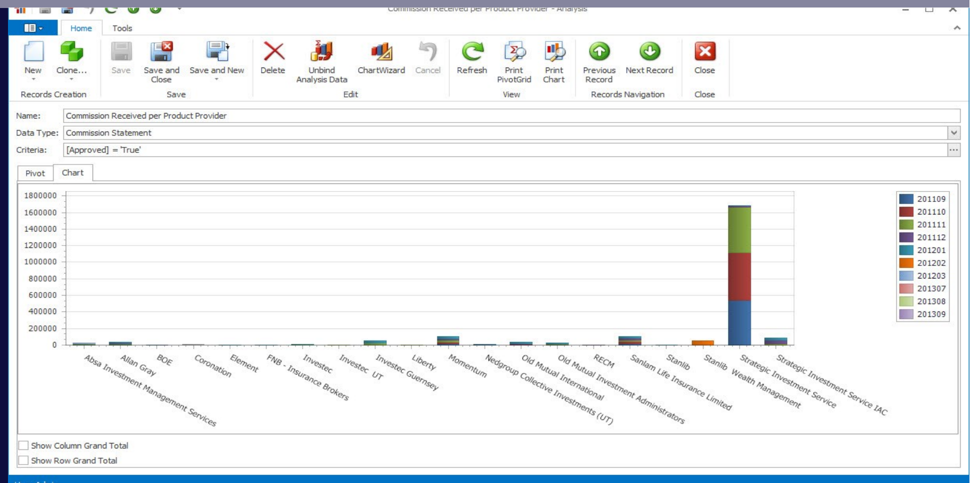
MINIMUM REQUIREMENTS

Server

- Windows Server 2012 R2 STD
- 4 x Xeon® CPU E5 2.6GHz
- 16GB RAM
- 2x1TB SATA Hard drives
- SQL Server 2016 Express/STD

Workstation

- Windows 7,8,10 (recommended)
- CPU i5
- 8GB RAM
- 500MB free disk space



IMPORT OF COMMISSION STATEMENTS

Flexible mapping tools allow integration to a large number of commission- and investment file formats from most of the product providers. The data can be imported using import wizards or a fully automated import process. You can also import contract data and recipient data as well as split arrangements of up to 3 levels. You can even provide access via the web application to load a contract directly.

CONSOLIDATE

One of the biggest advantages of this solution is the consolidated picture it provides of your business and your revenue stream; something not easily achieved from hundreds of different spreadsheets. Apply the features of the build-in Analysis tool and turn this data into information that can support your sales process and also provide valuable insight into your business.

PROCESS

Set up split rules and formulas for almost any commission- or fee sharing arrangement and process them consistently and effectively every month.

Setup expenses to be deducted from commission accounts or use the retention policies to control the payment of commission transactions.

Use the commission dashboard and reporting to track progress on commission processing.

DISTRIBUTE

Create you own commission statements or payment advices and distribute them electronically to the recipients. You can even provide access to the recipients to draw commission statements directly via our web application.

Pay commission transactions directly into the bank accounts of your recipients or integrate to your payroll system.