

Enabling  
efficient, effective,  
enjoyable compliance



Lifespan Partnership Program  
[www.adviceregtech.com/Lifespan](http://www.adviceregtech.com/Lifespan)



## Prepares

SAMI categorises  
advice files



- Compliance workbench and system of record
- Integrates
- Handles multiple docs and file types

## Assesses

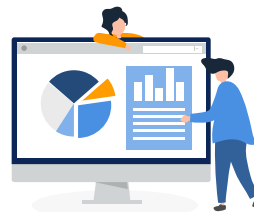
SAMI checks, highlights,  
scores and risk tags



- Pre-assesses
- Highlights
- Pre-scores
- Risk tags
- Suggests actions
- Reviews and comments
- Pre-populates report

## Verifies

Easy and enjoyable to  
use



- Compliance workbench and reporting solution enabling efficient, effective reviews
- Interactive, supportive
- Enables consistency
- Workflow convenience

## Reports

Real time reporting,  
Efficient workflow  
Supports coaching



- Dashboard reporting
- Real-time visibility
- Pre-emptive, Proactive
- Integrates
- Scale productivity
- Supports coaching



System-of-record for advice file reviews for pre-vet and audits



For SoAs plus related advice file documents eg Fact Find, Risk Profile, File notes



User-friendly, interactive, integrates



Gives you more time to focus on key issues and clients

For more info email  
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