



TICOON

INTRO TO TICOONSALES

Ticoon



GAME CHANGING PROGRAM FOR ADVISORS & INSURANCE AGENTS



ABOUT TICOON

Who we are and what we do

About Ticoon

WHO WE ARE

- In business since 1996
- 100% focused on the Canadian financial services and life insurance industries
- 50 employees and growing
- Located in the heart of Toronto Canada
- Cloud offering; Clients include: Independent Advisors, Insurance MGAs, Mutual Fund Dealers, Investment Dealers, Life Carriers, Fund Companies & Asset Managers, Credit Unions & Banks
- Tens of thousands of users on the Ticoon Platform

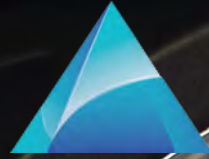
WHAT WE DO

- Consolidate advisor and client data & documents from multiple source systems to create a single advisor and client record
- Provide a network of online portals that enables users to see the appropriate data and communicate with each other
- Analyze the data and apply business rules to create statistics and identify sales opportunities
- Automate marketing programs to reach users



WHY TICCOON?

A quick look at some of our features



INCREASE YOUR SALES





Targeted Sales – Sales Opportunities

- Advanced search & data analytics
- Client Segmentation/List Management

Tools to Follow up and Track Status

- Task & activity management for you and your team

Multiple Communication Methods

- Sales Lists
- Email Marketing
- Document Publishing & Secure Messaging
- Mail Merge (print & mail)
- Content Publishing

Multiple Sales Processes

- Online Sales
- Sales Referrals
- Traditional Sales (calls, emails, follow ups)



Prepare Your Sales Campaign

Develop Sales Initiative

Example:

Disability Insurance Campaign

Determine Target Prospect Criteria

Example:

- Age 35 - 50
- Income greater than \$75,000
- More than \$250,000 investable assets
- More than one dependent

Execute 3 Easy Steps in TicoonSales

1

Run "Search" in TicoonSales

- Create prospect list

2

Communicate Offer to Prospects

- E-mail Marketing
- Content Publishing
- Secure Messaging
- Online Advertising

3

Co-ordinate Follow-ups

- Tasks
- Activities
- Events
- Calls/E-mails



360°

VIEW OF YOUR
CLIENT



All consolidated into a single portal!

Products

- Investments
- Life Insurance
- Health Insurance
- Banking
- Real Estate
- Personal Assets

Business

- Tasks
- Appointments
- Documents
- Notes

Family

- Goals & Needs
- Households
- Dependents
- Relationships



ENGAGE YOUR
CLIENTS ONLINE

Engage Your Clients Online



 |  SALES

Secure Messaging

 |  TOUCH

Document Sharing

Common Views



BE YOUR CLIENT'S
CENTRE OF
INFLUENCE



- Position yourself as your client's primary source of information and advice
- Create a network of business partners to service all of your client's needs
- Use TicoonSales to manage all of your referral arrangements ensuring you are always the 'Primary Advisor'



BE COMPLIANT





Ticoon supports the financial services/ insurance industry regulatory and compliance requirements as follows:

- Totally Know Your Client
- Approved Data Segmentation & Presentation
- Appropriate Disclaimers & Branding
- Secure Messaging
- Reporting
- Auditable Communications
- Client Notes
- Outside Business Activity
- Data Storage & Security (in Canada)
- Client Consent
- CASL
- E-delivery
- User Audits



IDENTIFY
GROWTH
OPPORTUNITIES



Key Performance Indicators: Know your client, know your business.

- Ticoon's Key Performance Indicators (KPIs) provide you with a snap shot of your business.
- Drill into each Fact to identify sales & service opportunities
- Analyze your business to identify growth opportunities
- Conduct searches to segment your clients and further identify client needs



GENERATE NEW
REVENUE



- Self-serve programs for your clients
- Profile Based Targeted Advertising for home, auto and travel insurance
- Generate income that is currently going to your competitors!



OUTSOURCED &
SECURE



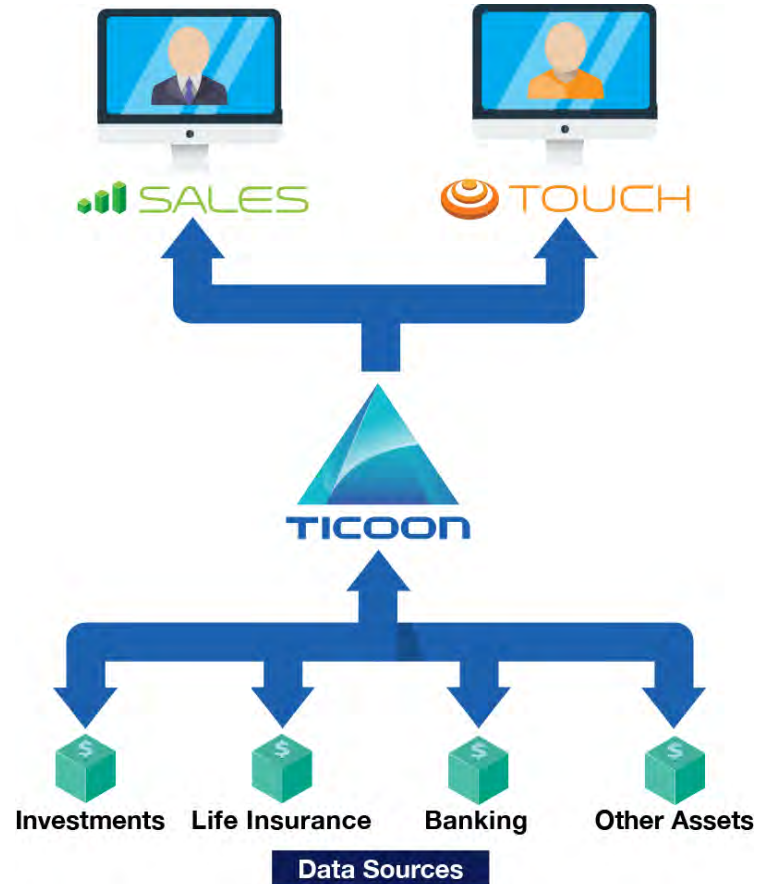
- No software
- No downloads
- No up front costs
- No long term commitment
- Pay as you go!
- 1 username, 1 password to manage your entire business!
- Data is 100% secure & backed up



TICOON SOLUTION OVERVIEW

Ticoon Solution Overview

- Ticoon consolidates data and documents from multiple product lines and source systems
 - Investments
 - Life Insurance
 - Banking
 - Other
- Advisor access their client data using TicoonSales
- Consumers access their data using TicoonTouch
- Each portal is equipped with features that enable the user to leverage the data for their own purposes





ADVISOR PORTAL



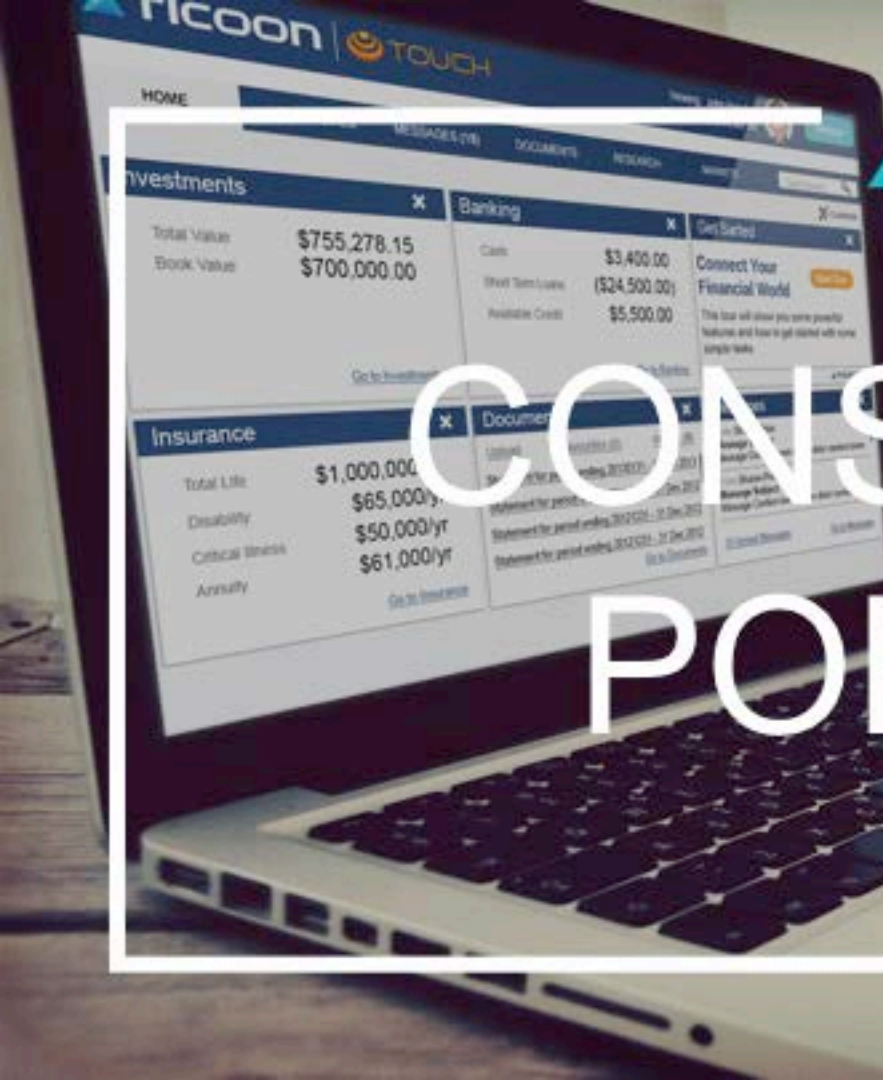


Key Features

- Single portal to manage all client data and interactions
- Single view of the consumer/household (see Data Consolidation & Access slides)
- CRM
- Opportunity management & referral programs
- List management
- E-Delivery of client documents
- Email & content marketing
- Document publishing
- Secure messaging between advisors and their clients
- Pre-filled forms
- Client & management reporting
- TicoonStore (to purchase additional products & services)



Upcoming Version 6



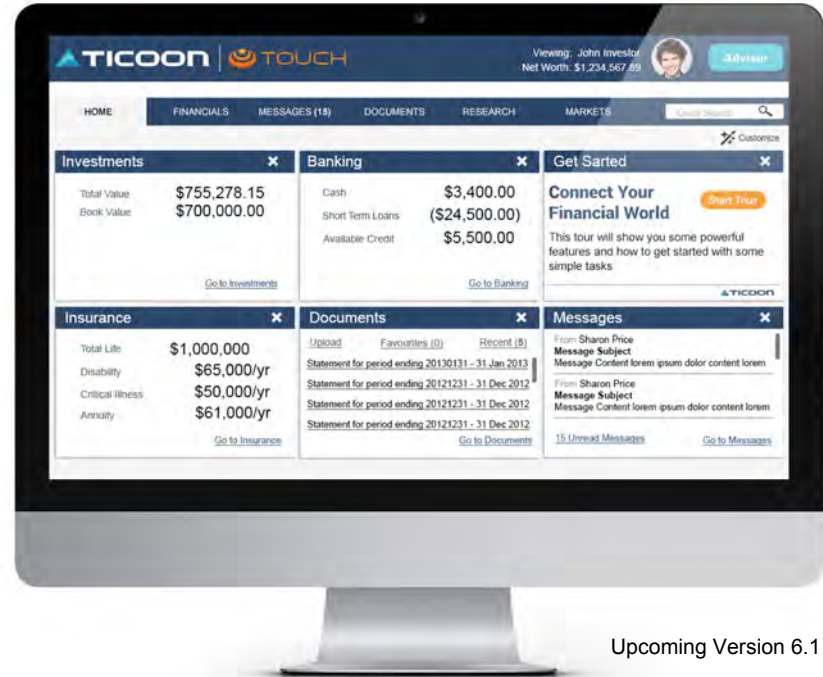
CONSUMER PORTAL



TicoonTouch provides your clients with a rich online experience.

Key Features

- A single view of
 - Investments
 - Life Insurance Policies
 - General Insurance Policies
 - Mortgages & Loans
- Household views
- Secure Messaging with advisors
- E-delivery of documents
- Document vault for storage of documents
- Personalized views
- Self-serve programs to purchase home, auto & travel insurance
- Self-serve programs to apply for loans & mortgages





DATA POWERS GROWTH

Automated Data Feeds



Manual Data Entry



CRM & Spreadsheet Uploads



ADVISOR TRAINING & SUPPORT





Ticoon offers multiple advisor training options

- Regular webinars
- Branch Training (face-to-face)
- Conference Break-out sessions
- Online User Guides
- Email Tips

Ticoon Training Programs have been approved by Ontario, BC and Alberta for CE Credits (1 credit/1 hour training)

www.ticoon.com/webinars/

Get up and Running



Start your **15 day free trial** today,
it takes 2 minutes!

www.ticoon.com/gettingstarted


A screenshot of a web browser displaying the TICOON Registration New User Setup form. The browser window has two tabs: "Ticoon Sales" and "New Tab". The address bar shows "Ticoon Sales". The form is titled "TICOON Registration New User Setup" and has a progress indicator with three steps: 1. Personal, 2. Review, and 3. Submit. The form fields include: First Name, Last Name, What is your role? (with radio buttons for Advisor and Assistant, where Advisor is selected), Phone (with a placeholder (999) 999-9999), Country (with a dropdown menu showing Canada), Email Address (with a placeholder name@domain.com and a note "This will become your username."), Password (with a note "8-32 characters. Must contain at least 2 numbers. (2 characters remaining)"), and Confirm Password (with a note "2 characters remaining"). At the bottom, there is a checkbox for "YES - I wish to receive future email communications from TicoonSales." The background of the form is a scenic image of snow-capped mountains under a blue sky.

Want to Learn More?





- Check out our website www.ticoon.com
- Register for a Ticoon Webinar www.ticoon.com/webinars/
- Organize a Lunch & Learn for your team or office
 - Call 1-855-513-9523
 - Email sales@ticoon.com
 - Text us 416-523-6251

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THANKS!



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