

Exweb Tariff Guide

Licence Costs		
Exweb	<ul style="list-style-type: none"> Single Adviser or Administrator user account – monthly subscription Multiple account discounts¹ – monthly subscription 2-20 accounts @ 10% 	<ul style="list-style-type: none"> £14.00 each
Exweb Broker	<ul style="list-style-type: none"> Single Adviser or Administrator account - monthly subscription 	<ul style="list-style-type: none"> £10.00 each
Exweb Gold	<ul style="list-style-type: none"> Single Adviser user account – monthly subscription Multiple account discounts¹ – monthly subscription 2-20 accounts @ 10% 	<ul style="list-style-type: none"> £35.00 each £31.50 each
Training and Consultancy	<ul style="list-style-type: none"> Please contact sales on 0845 053 0490 for the latest information or email training@exchange.co.uk 	

Premium Services**		
Equity release	<ul style="list-style-type: none"> Lifetime mortgage and home reversion comparison quotes Lump sum, drawdown and flexible reverse options 	<ul style="list-style-type: none"> FREE until further notice†
Annuities*	<ul style="list-style-type: none"> Compulsory purchase annuity Purchase life annuity Immediate resting personal pension Fixed term annuity Variable annuity Longevity income plan 	<ul style="list-style-type: none"> £18.00 per month or £1.50 per access
Private medical insurance	<ul style="list-style-type: none"> Offers easy comparison of premiums, product features and impact of excesses 	<ul style="list-style-type: none"> £18.00 per month or £1.50 per access
Exweb Product Research	Modules available <ul style="list-style-type: none"> Pensions savings Pensions income Investment products Life assurance Health insurance Finance Offshore products 	<ul style="list-style-type: none"> Pay-per-hour: £5 for 60 minutes of research in a single area Modular: £10 per month per module with a choice of 7 modules All modules: £50 per month for all 7 modules Full tool: £85 per month for the full Synaptic Product Research Tool
Credit checking		<ul style="list-style-type: none"> £2.50 per search
Advisernet (website building service)	<ul style="list-style-type: none"> Build your own or have full technical support Fully templated and completely editable Quote services available to display on your website 	<ul style="list-style-type: none"> £49.00 per month
Term plugin	<ul style="list-style-type: none"> Fully templated Customisation options 	<ul style="list-style-type: none"> £10.00 per month
Third party mortgage sourcing	<ul style="list-style-type: none"> Sourcing software available: Trigold and Mortgage Brain 	<ul style="list-style-type: none"> £19.99 per month

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Pension tools*	<p>Online Tools</p> <ul style="list-style-type: none"> Contracting out guide, Pension or Drawdown, calculations, charges and switching, Transfer value analysis Individual tools Complete set of tools <p>CD-based Tools</p> <ul style="list-style-type: none"> Transfer value analysis Full Pension or Drawdown Full 	<ul style="list-style-type: none"> £4.00 per access £40.00 per month unlimited use £50.00 per month £20.00 per month (plus per case and per report fee)
e-Suitability	<ul style="list-style-type: none"> Costs charged on a stepped basis 	<ul style="list-style-type: none"> from £25.00 per month
e-Identity checking	<ul style="list-style-type: none"> Eliminates the need to store and post photocopies of documents provided. 	<ul style="list-style-type: none"> £2.50 per search

Free services (included in monthly subscription)

Term Assurance Quotes	<ul style="list-style-type: none"> Exweb Exweb Gold Exweb Broker 	<ul style="list-style-type: none"> Term Assurance, Term Under One Year, Convertible Term*, Renewable Term, Renewable Convertible Term*, Family Income Benefit, Mortgage Protection, Gifts Inter Vivos, Level Decrement
Whole of Life and Critical Illness Quotes	<ul style="list-style-type: none"> Exweb Exweb Gold Exweb Broker 	<ul style="list-style-type: none"> Whole of Life, Critical Illness, Critical Illness and Life Cover
Income Protection Quotes	<ul style="list-style-type: none"> Exweb Exweb Gold Exweb Broker 	<ul style="list-style-type: none"> Own Life, Life of Another, Keyperson, Houseperson
Pension Quotes	<ul style="list-style-type: none"> Exweb Exweb Gold 	<ul style="list-style-type: none"> Self-employed Pensions, Employed Pensions, Executive Pensions
Bond Quotes	<ul style="list-style-type: none"> Exweb Exweb Gold 	<ul style="list-style-type: none"> With Profits Bonds, Unit Linked Bonds, Distribution Bonds, Mixed Unit-linked and With Profit Bonds
General Insurance Quotes	<ul style="list-style-type: none"> Exweb Exweb Gold Exweb Broker 	<ul style="list-style-type: none"> ASU/MPPI, Buildings and Contents, Commercial, Health, Marine, Motor, Pet, Professional Indemnity, Travel
Investment Services	<ul style="list-style-type: none"> Exweb, Exweb Gold 	<ul style="list-style-type: none"> Fund Charting, Fund Fact Sheets, Daily Fund Price Listing
New Business	<ul style="list-style-type: none"> Exweb Exweb Gold Exweb Broker 	<ul style="list-style-type: none"> Electronic Submission, Application Forms
Gold Services	<ul style="list-style-type: none"> Exweb Gold 	<ul style="list-style-type: none"> Real-time Valuations, Contract Management
Other Services	<ul style="list-style-type: none"> Exweb, Exweb Gold Exweb Broker 	<ul style="list-style-type: none"> Conveyancing, Client Database, Client Import Facility, Document Library, Provider Centre

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Notes on tariffs

- Multiple copy discounts are not applicable in conjunction with any other offer. Multiple copy discounts are only applicable providing the accounts are grouped under one invoice and collected by one direct debit.
- All prices exclude VAT.
- Monthly subscriptions will be taken a month in advance through a Direct Debit. Fees for chargeable services will be debited from your account the month following the month in which the chargeable services were incurred.
- Tariffs subject to terms and conditions.
- Tariff correct at time of going to print. August 2009

† The Equity Release service is FREE until further notice subject to terms and conditions. At the end of the period the service will be chargeable at the current rate at that time. * Not available via Exweb Broker software. ** For further information on premium services, or to apply, please contact sales on 0845 053 0490.

