

Avelo Exchange Tariff Guide

Licence Costs		
Avelo Exchange	<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
Avelo Exchange Broker	<ul style="list-style-type: none"> • Single Adviser or Administrator account - monthly subscription 	<ul style="list-style-type: none"> • £10.00 each
Avelo Exchange 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

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
Avelo Exchange Product Research	<ul style="list-style-type: none"> • Modules available • 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
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 £33.00 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"> • £3.00 per search

Services included in monthly subscription

Term Assurance Quotes	<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
Business Protection	<ul style="list-style-type: none"> • Level Term, Convertible Term*, Renewable Term*, Renewable Convertible Term*, Mortgage Term Protection, Key Person Income Protection
Whole of Life and Critical Illness Quotes	<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"> • Own Life, Life of Another, Keyperson, Houseperson
Pension Quotes*	<ul style="list-style-type: none"> • Self-employed Pensions, Employed Pensions, Executive Pensions
Bond Quotes*	<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"> • ASU/MPPI, Buildings and Contents, Commercial, Health, Marine, Motor, Pet, Professional Indemnity, Travel
Investment Services*	<ul style="list-style-type: none"> • Fund Charting and Listings, Fund Fact Sheets
New Business	<ul style="list-style-type: none"> • Electronic Submission, Application Forms
Gold Services*	<ul style="list-style-type: none"> • Real-time Valuations, Contract Management
Other Services	<ul style="list-style-type: none"> • Conveyancing, Client Database, Client Import Facility, Document Library, Provider Centre, Offshore Centre*

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. April 2011

† 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 Avelo Exchange Broker software.

Jessop House
 Jessop Avenue
 Cheltenham
 Gloucestershire
 GL50 3SH

Email exchange.accountservices@avelo.com

Web www.avelo.com

Telephone 0845 053 0490

Fax 0845 053 0495