

# Next generation sites features

Welcome to your NextGen Website – built on new technology, with new designs, features and digital tools. Select from the various packages now available to give you the right site for your needs.

|  | Sites Pro  | Sites Pro+ | Sites 24/7 |  |
|--|------------|------------|------------|--|
|  |            |            |            | <b>X</b> Not available on this package <b>●</b> Available on this package  |
| <b>Setup costs</b>                     | <b>£0</b>  | <b>£0</b>  | <b>£0</b>  |  |
| <b>Monthly fee</b>                     | <b>£20</b> | <b>£40</b> | <b>£60</b> | <b>VAT will be added to all costs quoted. THERE IS NO SET-UP COST.</b>   |
| Hosting                                | ●          | ●          | ●          | We will host the website for you.  |
| Mobile optimised                       | ●          | ●          | ●          | All the sites are responsive so they display properly on mobiles and tablets.  |
| Pre-set content (25 pages)             | ●          | ●          | ●          | Pre-written and approved content, giving an overview of your services.   |
| Compliance approval                    | ●          | ●          | ●          | We will ensure that the core content is compliance approved and kept up to date.   |
| Unlimited pages                        | X          | ●          | ●          | There's no restriction on the number of pages you can have in your site. You can write additional content yourselves or, for an extra cost, we can write it for you. |
| Content Management System (CMS)        | ●          | ●          | ●          | The Content Management System (CMS) enables you to edit some of the pages, such as the About Us page.  |
| CMS+                                   | X          | ●          | ●          | This advanced feature enables you to create bespoke pages, such as adviser profiles and adviser contacts.  |
| Images                                 | ●          | ●          | ●          | Choose from a selection of images that will display on your website.   |
| Images +                               | X          | ●          | ●          | This feature enables you to upload your own images to your site.   |
| Maps (1 Google map)                    | ●          | ●          | ●          | Your website will have a Contact us page which provides contact details and a map of your office location.   |
| Maps + (multiple Google maps)          | X          | ●          | ●          | Maps + is for firms who have more than one office/ location. The website will provide details of each office location, with a map for each.                          |
| Contact us                             | ●          | ●          | ●          | A page with the details of a contact at your firm, and one location, and a link to send an email enquiry.  |
| Contact us + (multiple offices/people) | X          | ●          | ●          | A page with the details of multiple contacts, ideal if your firm has different offices, and a link to send an email enquiry.   |
| Testimonials                           | X          | ●          | ●          | Display client testimonials on your site to add credibility to your firm   |
| Google analytics                       | ●          | ●          | ●          | We can link your google analytics account to the website. This provides you with statistics about visitors to your site  |
| Search facility                        | X          | ●          | ●          | A simple key word search facility.   |
| Slideshow banner                       | X          | ●          | ●          | This feature enhances your site with home page imagery that rotates.   |
| Video capabilities                     | X          | ●          | ●          | This function enables you to add videos to your site.  |
| Support                                | ●          | ●          | ●          | Access to support line/email to get help using and making the most of your site.   |
| Email campaign facility                | X          | X          | ●          | An email account for you to use, to email HTML messages to your clients to drive more traffic to your site.  |
| Blog facility                          | X          | ●          | ●          | This blog facility will allow firms to write and publish their own articles.   |
| Social media links                     | ●          | ●          | ●          | Links to your accounts of the major social media platforms – Twitter, Facebook and LinkedIn.   |
| Social Media Integration               | X          | ●          | ●          | Integration with the major social media platforms.   |
| Multiple Social Media Links            | X          | X          | ●          | Ability to have more than one social media account integrated.   |
| Promotional Banner                     | X          | X          | ●          | Allows you to add any new features, news or plugins as an advert.  |
| Drop down menu                         | X          | X          | ●          | Sites can have multi-level menus.  |
| Testimonials Slider                    | X          | X          | ●          | Allows for testimonials to scroll across the home page.  |
| Hover Transitions                      | X          | X          | ●          | Provides transitions for any images boxes added.   |
| Live chat facility                     | X          | X          | ●          | We support the HelpOnClick live chat facility.   |
| Contact Form                           | ●          | ●          | ●          | Allows for a simple enquiry form on your site.   |
| Contact Form +                         | X          | X          | ●          | Allows for a personalised contact form to be added to the site.  |

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| Energy switching tool                       | ●          | ●          | ●          | A simple facility for users to compare their current energy tariffs with those from Octopus energy – they could save and also do their bit for the planet                                  |
| Pension Monster (1)                         | ●          | ●          | ●          | An online retirement guidance tool that aims to help people better understand their retirement options and how much more they may need to save to provide for the retirement they want.    |
| Pension Monster + (1) (included tracker)    | ✗          | ●          | ●          | This enhanced version of Pension Monster includes a facility to enable you to find out who has done what on the site.  |
| GI quote and buy                            | ●          | ●          | ●          | This link provides your clients with access to a service which enables them to obtain quotes and purchase General Insurance products.  |
| Client Portal IO (2)                        | ●          | ●          | ●          | An Intelliflo client portal login.   |
| Whole of Market Life & CI Cover Quote & Buy | ●          | ●          | ●          | Providing you with a branded quote comparison and apply capability for simple Life and Critical Illness solutions.   |
| Junior ISA investment facility              | ●          | ●          | ●          | Visitors to your site will be able to invest in Junior ISAs online, with a choice of investment type.  |
| Best Buy and Mortgage Sourcing Solution (3) | ●          | ●          | ●          | Mortgage Brain's B2C Best Buy Table and Mortgage Search plug-ins.  |
| Octopus Choice                              | ●          | ●          | ●          | Peer-to-peer lending.  |
| Customer rating facility                    | ●          | ●          | ●          | An integration with the VouchedFor rating service.   |
| Cash Management Calculator (4)              | ●          | ●          | ●          | An integration into the Deposit Sense Cash Management system with an additional Online Savings Calculator.   |
| Mortgage repayment calculator               | ●          | ●          | ●          | A handy mortgage calculator for your website visitors to use.  |
| IHT calculator                              | ●          | ●          | ●          | A simple IHT calculator.   |
| Longevity calculator                        | ●          | ●          | ●          | A mortality calculator, predicting likely age at death.  |
| Retirement budget planner                   | ●          | ●          | ●          | Budgeting tool to help confirm expenditure in retirement.  |
| Indicative lifetime mortgage calculator     | ●          | ●          | ●          | A quick tool to estimate lifetime mortgage availability.   |
| Newsletters                                 | ✗          | ●          | ●          | We will add a choice of newsletters to your site, every quarter. These are pre-approved and include articles about topics that are relevant to your clients, keeping your site up-to-date. |
| Property Market Review                      | ✗          | ✗          | ●          | These provide an overview of the housing market and the commercial property market. The content is pre-approved and will automatically be added to your website each month.                |
| Economic Review                             | ✗          | ✗          | ●          | The Economic Review provides a monthly overview of global economic events and news, plus an update on the markets. It is pre-approved and will be added to your site automatically.        |
| Budget Update                               | ✗          | ✗          | ●          | Published the day after the Chancellor's speech, this pre-approved update will be added to your site automatically.  |
| Tax infographics                            | ✗          | ✗          | ●          | An infographic, produced annually providing handy information on key tax facts and figures.  |

**(1) To qualify for Pension Monster you must be a Selectapension customer. If not, there will be a separate charge, paid to Selectapension**

**(2) You must have an Intelliflo licence to use this tool and will be charge an additional £10.50pcm (plus VAT) by Intelliflo for the portal**

**(3) The best Buy Table and Mortgage Search plug-in are only available to Mortgage Brain subscribers. On top of your normal subscription, you will be charged £15pcm for these plug ins by Mortgage Brain**

**(4) This calculator is free to Deposit Sense subscribers**

Bespoke copywriting, design and build available on request. The provision of the sites will be subject to final terms and conditions. Availability will be subject to final implementation plans and third party involvement subject to final review. All third party links/integrations have their own Ts&Cs and a number have their own commercial terms.

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