

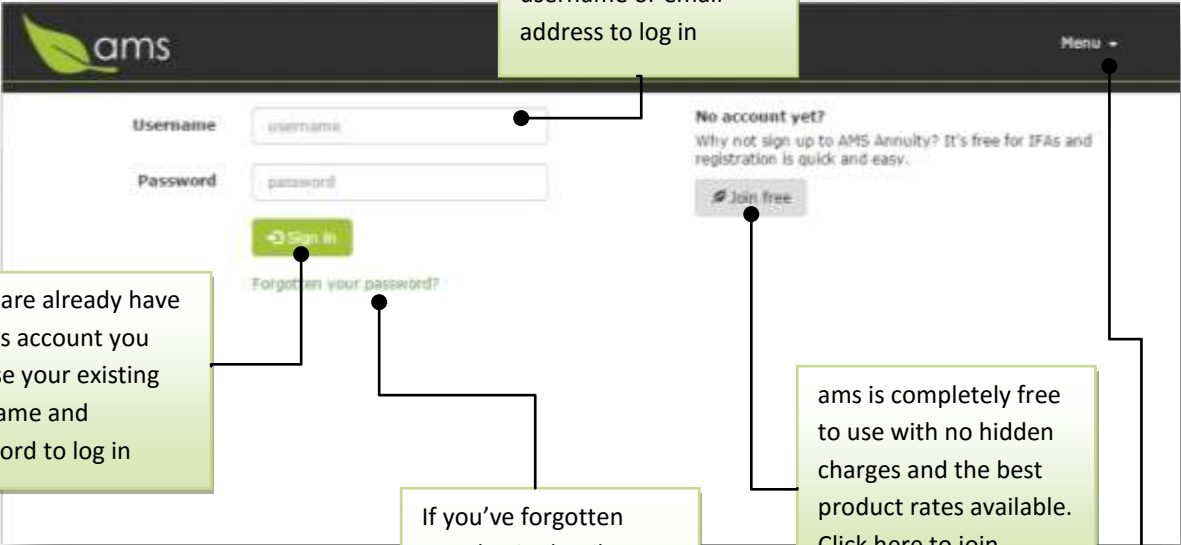


ams retirement

User guide



Registering and logging in



The screenshot shows the AMS login page. At the top left is the AMS logo. On the right is a 'Menu' dropdown. The main content area has a 'Username' field with 'username' entered, a 'Password' field with 'password' entered, and a green 'Sign in' button. Below the password field is a link for 'Forgot your password?'. To the right, there is a 'No account yet?' section with a 'Join free' button. A 'Menu' dropdown is visible in the top right corner.

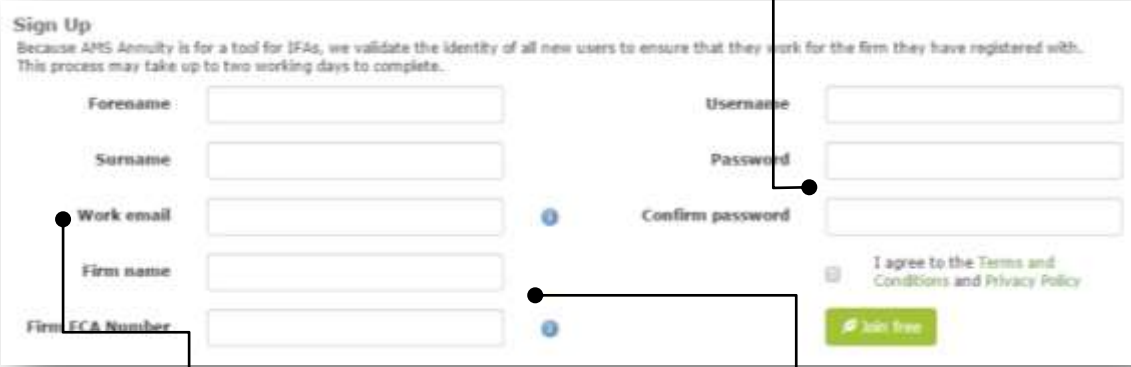
You can use your username or email address to log in

If you are already have an ams account you can use your existing username and password to log in

If you've forgotten your log in details we will email you a link allowing you to reset your password

ams is completely free to use with no hidden charges and the best product rates available. Click here to join

Use the 'Contact us' option in the menu dropdown to send us a message



The screenshot shows the AMS Sign Up page. It includes a heading 'Sign Up' and a sub-heading 'Because AMS Annuity is for a tool for IFAs, we validate the identity of all new users to ensure that they work for the firm they have registered with. This process may take up to two working days to complete.' The form has fields for 'Forename', 'Surname', 'Work email', 'Firm name', 'Firm FCA Number', 'Username', 'Password', and 'Confirm password'. There is a checkbox for 'I agree to the Terms and Conditions and Privacy Policy' and a green 'Join free' button. Information icons are present next to the 'Work email' and 'Firm FCA Number' fields.

Make sure your password has at least one letter and one number in it

Sign-up is quick and easy. Once registered, we will send you an email to verify your email address

We match your firm name and FCA number with existing ams users. If your colleagues already use ams we will add you to your firm's account

Home page

The screenshot shows the AMS Home page with several callout boxes:

- Search for your existing clients or quotes here**: Points to the search bar in the top navigation.
- Navigate to any part of the site using the Menu dropdown**: Points to the 'Menu' dropdown in the top right.
- Click here to start a quote for a new client**: Points to the 'New Client quote' button.
- Your firm's last three quotes are displayed here. You can generate a new quote for the client, view the results or view the **client timeline** by clicking on the client's name**: Points to the 'Recent quotes' table.
- Our home page widgets allow you to run quick calculations and give access to useful information. We have a number of new widgets in the pipeline**: Points to the 'Quick annuity quote' widget.
- A full **quote history** for your firm is available here**: Points to the 'View full quote history' button.
- Search document library**: Points to the search bar in the 'Document library' widget.

Recent quotes

Client Name	New quote	Results
Jinx McTest	[New quote]	[Results]
test case	[New quote]	[Results]
test case	[New quote]	[Results]

Quick annuity quote

Get a quick indicative guaranteed retirement income quote.

[Run a quick quote]

Document library

Search document library

Submitting your quote

ams Client or quote User: Philip J Fry Firm: AMSPortal Test & Staff x Menu

Client ref: 34209
Mr Edward Jones

Personal details
Medical assessment
Conditions 12

Mrs Edwina Jones
Personal details
Medical assessment
Conditions 1

Retirement
Pensions 1

Quote options
Home

Type of quote

Fund driven
 Income driven

Pension selection

Please select the pensions you want to use for this quote.

Include	Provider	Policy ref	Fund
<input type="checkbox"/>	Test	12345	£50,000.00
			£0.00

Scheme type: Contribution OHO

Income options

Tax free cash: Max

Commencement date: ASAP Specified date

You can select the pensions you want to include in this quote by ticking this box.

Charge type: Fixed charge in £
£ 500.00

% of fund after tax-free cash

Include fund?: Yes

Get quotes >

Once you have entered all your client information and their Quote options click on the 'Get quote' button to produce real-time quotes for all the providers and products supported by AMS.

Results screen

Quote ref: 56710
 Client: Jinx McTest
 Basis: Advised Request date: 25/11/2014 Fund value: £50,000.00 Expected TIC: £12,500.00

Lifetime
 Annual income between **£2,274.60** and **£2,626.80**
 Results received for 6 out of 12 products

Fixed Term
 Annual income between **£3,262.00** and **£3,262.44**
 Results received for 2 out of 2 products
 Quote options Term: 5 years 0 months Change

Investment Linked
 Annual income of **£2,487.96**
 Results received for 1 out of 2 products
 Quote options Assumed level of return: 3.50% Change

Change and re-send
 Download CQF pdf
 Quote summary
 Request manual quotes

Click on the client's name to view the client timeline.

The results screen is now split into different product types

Show the quote responses by clicking here

The range of incomes together with the number of providers that have responded is displayed here

For some product types, assumptions have been made to provide a response. These assumptions can be changed if required

Annual income is displayed together with uplift from standard rate where appropriate

Legal & General

Annual income: **£2,626.80** (16.44% uplift)
 Remuneration: £300.00
 Warnings:
 • This quote is not guaranteed as the agent number is not recognised. Default terms have been used. Please check that you have entered your details correctly, or complete the agency registration form at agencyreg.origosevices.com

Details

Responses are colour coded:
 Brown = warnings
 Green = success
 Red = no response provided

The Details button will show more information about the quote, give access to documents and allow you to request a manual quote

Quote options
 Term: 5 years 0 months | Required income: £2,450.00 Change

I want to specify the...
 Income
 Maturity

Required income
 £ 2450.00 Use highest lifetime income

Set term by
 Age
 Years/Months

Years 5

Months 0

Refresh

Clicking on the Change link will allow you to change the options for this product.

To request a requote click on the Refresh button

Client history

You can choose to view all your firm's quotes or quotes carried out by yourself

Enter a quote id, client id or client's surname or postcode here

The 'Search' button will load the list according to search criteria and filter applied

The screenshot shows the 'ams' interface with a search bar containing 'Jones'. Below the search bar, there are filters for 'My firm's clients' and a search button. The main table displays a list of quotes with columns for Date, Client, Latest quote, and Current status. A callout box points to the search bar, another to the search button, and a third to the 'My firm's clients' filter. A fourth callout points to the 'Results' button for a specific quote. A fifth callout points to the 'Continue' button for a quote with an 'In progress' status. A sixth callout points to the 'Results' button for a quote with a minus sign in the date column. A seventh callout points to the client's name in the table. A eighth callout points to the 'Latest quote' column. A ninth callout points to the 'Current status' column. A tenth callout points to the 'Results' button for a quote with a plus sign in the date column.

Date	Client	Latest quote	Current status
Today	Mr David Jones	£1,659.00	Submitted
Today	Mr Edward Jones	-	In progress
21/04/2015	Mr Edward Jones	£5,772.96	Submitted
21/04/2015	Mr Edward Jones	£5,772.96	Submitted
21/04/2015	Mr David Jones	£5,124.00	Submitted
21/04/2015	Mr David Jones	£5,124.00	Submitted

Quote ref: 69551
Client ref: 39457
DOB: 01/12/1945
Postcode: LS1 1AA

Adviser: John Adviser
Price: £100,000.00
TFC: £25,000.00

Each quote can be expanded to view more detail

The highest lifetime annuity for the client's latest quote is displayed here.

Click on the 'Results' button to view the full results for this quote or the 'Continue' button to continue with a quote that has not yet been submitted

Click on the client's name to view their **timeline** where you can view their complete quote history.

ams allows you to save a quote to be submitted later. These quotes are marked as 'In progress'

Client timeline

The screenshot displays a client profile for 'Client ref TEST003'. The interface is divided into several sections: 'Client details', 'Status', 'Attachments (2)', 'Activity', and 'Alerts (3)'. Callout boxes provide instructions on how to use these features.

Client details: Includes information for Mr McTest (TEST003) and Mrs Testina Client, such as gender, marital status, date of birth, and total funds. An 'edit' button is visible.

Status: Shows 'Record created' on 28/05/2012 with a 'change' link.

Attachments (2): Lists two files: 'Test Attachment.pdf' and 'thor.jpg', both dated 19/08/2014. Each has a cross icon for archiving and a 'view' link.

Activity: A table of quotes with columns for date, quote number, fund amount, and user. Each quote has a cross icon for archiving.

Alerts (3): A list of reminders with columns for date/time, message, and recipient.

Callout boxes:

- Top left:** 'An overview of your client is displayed here' (points to Client details).
- Top center:** 'The client's status can be set here' (points to Status).
- Top right:** 'Click here to attach a file. If supported, these attachments will be available to send to providers within manual quote requests.' (points to Attachments).
- Center:** 'Quotes can be archived by clicking the cross alongside each quote' (points to the cross icons in the Activity table).
- Bottom left:** 'Clicking on the quote will load the quote' (points to a quote entry in the Activity table).
- Bottom center-left:** 'Your colleague that carried out the quote is displayed here' (points to the 'AMS Admin' column in the Activity table).
- Bottom center-right:** 'Notes can be added to your client's record' (points to the 'new note' link in the Activity section).
- Bottom right:** 'To start a new quote for this client, click here' (points to the 'new quote' link in the Activity section).
- Bottom right (lower):** 'You can set up an email reminder here. The reminder can be sent to you or any of your colleagues' (points to the Alerts section).