

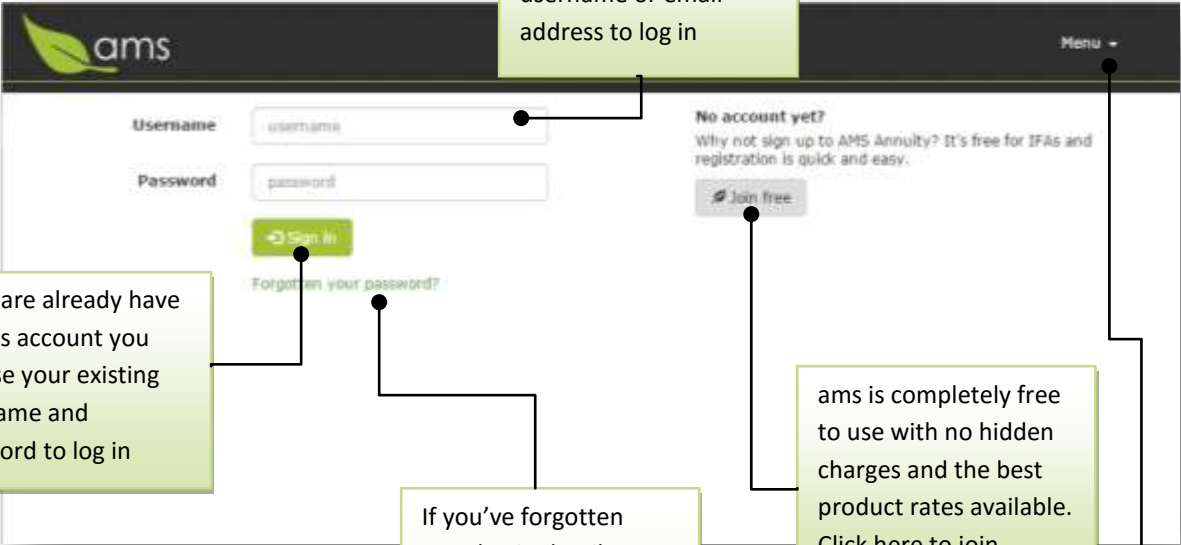


ams retirement

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.

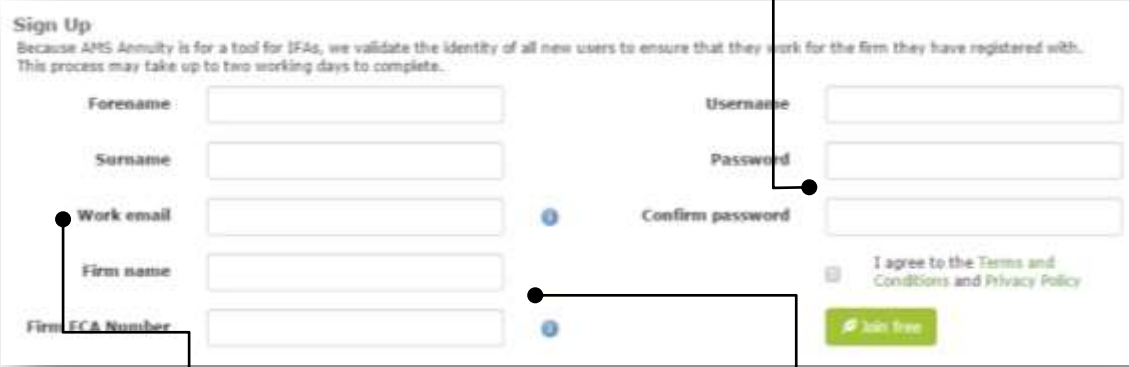
You can use your username or email address to log in

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 fields include: 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.

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 the following 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.
- View full quote history**: Points to the 'View full quote history' button.
- Run a quick quote**: Points to the 'Run a quick quote' button.
- A full **quote history** for your firm is available here**: Points to the 'Document library' section.
- Search document library**: Points to the search bar in the document library.
- 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.

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

Quote process

The screenshot shows a quote process form for Mr Edward Jones (Client ref: 34209). The form is divided into sections: Personal details, Medical assessment, Conditions (1), Retirement, Pensions (1), and Quote options. A 'Save' button is located at the bottom left. The 'Basic details' section includes fields for Title (Mr), First name(s) (Edward), Surname (Jones), Gender (Male), Has dependant (Yes), Marital status (Married), Postcode (LS18 4DF), and Date of birth (05/02/1953). There are also expandable sections for 'Further details' and 'More information'. A 'Medical assessment' button is at the bottom right. Callouts provide instructions: 'Navigate to any step of the quote process using these links' points to the left-hand navigation menu; 'The flag indicates that there is information missing that may affect the quote received' points to a red flag icon next to the Surname field; 'Save the form at any time by clicking the 'Save' button' points to the Save button; and 'You can work your way through the quote process by clicking on this button' points to the Medical assessment button.

Navigate to any step of the quote process using these links

The flag indicates that there is information missing that may affect the quote received

Save the form at any time by clicking the 'Save' button

You can work your way through the quote process by clicking on this button

The screenshot shows a confirmation dialog box titled 'You have unsaved changes' with a close button (X). The dialog asks 'Do you want to save these changes before continuing?' and offers two options: 'Save and proceed' and 'Proceed without saving'. The background shows the 'Medical assessment' section of the form, which is highlighted with a dashed border. A callout points to the 'Save and proceed' button with the text: 'If you attempt to navigate to a page without saving, you will be asked how you want to proceed'.

If you attempt to navigate to a page without saving, you will be asked how you want to proceed

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

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

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

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' client history interface. At the top, there is a search bar containing 'Jones' and a search icon. To the right, the user information is displayed: 'User: Phillip J Fry' and 'Firm: AMSPortal Test & Stuff'. Below the search bar, there is a dropdown menu set to 'My firm's clients' and a search input field containing 'Jones'. A 'Search' button is located to the right of the search input. The main content is a table with the following columns: 'Date', 'Client', 'Latest quote', and 'Current status'. The table contains several rows of data. The fourth row is expanded, showing additional details for the quote: 'Quote ref: 69551', 'Client ref: 39457', 'DOB: 01/12/1945', 'Postcode: LS1 1AA', 'Adviser: John Adviser', 'Price: £100,000.00', and 'TFC: £25,000.00'. Callout boxes point to various elements: the search bar, the search button, the dropdown menu, the search input, the 'Results' button for the expanded quote, the 'Continue' button for the 'In progress' quote, the client's name in the table, the 'Latest quote' column, and the 'Results' button for a submitted quote.

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

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', 'Activity', and 'Alerts'. Callout boxes provide instructions on how to use these sections.

Client details: Includes personal information for Mr McTest (TEST003) and Mrs Testina Client, along with their addresses and contact details.

Status: Shows the record creation date (28/05/2012) and options to view history or change status.

Attachments: Lists files like 'Test Attachment.pdf' and 'thor.jpg' with options to view or delete them.

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

Alerts: Shows reminders for sample collection and quote follow-ups, including the recipient's name (Eddie Widdows).

Callout boxes:

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