

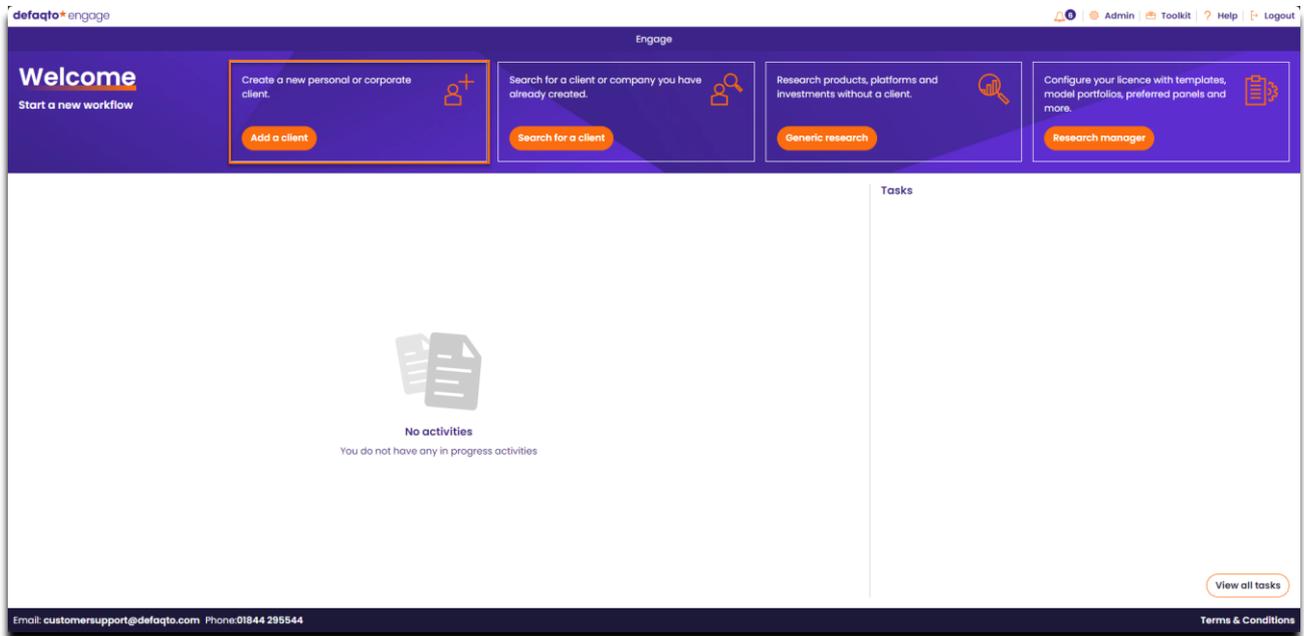
Defaqto Engage CIC Compare

Contents

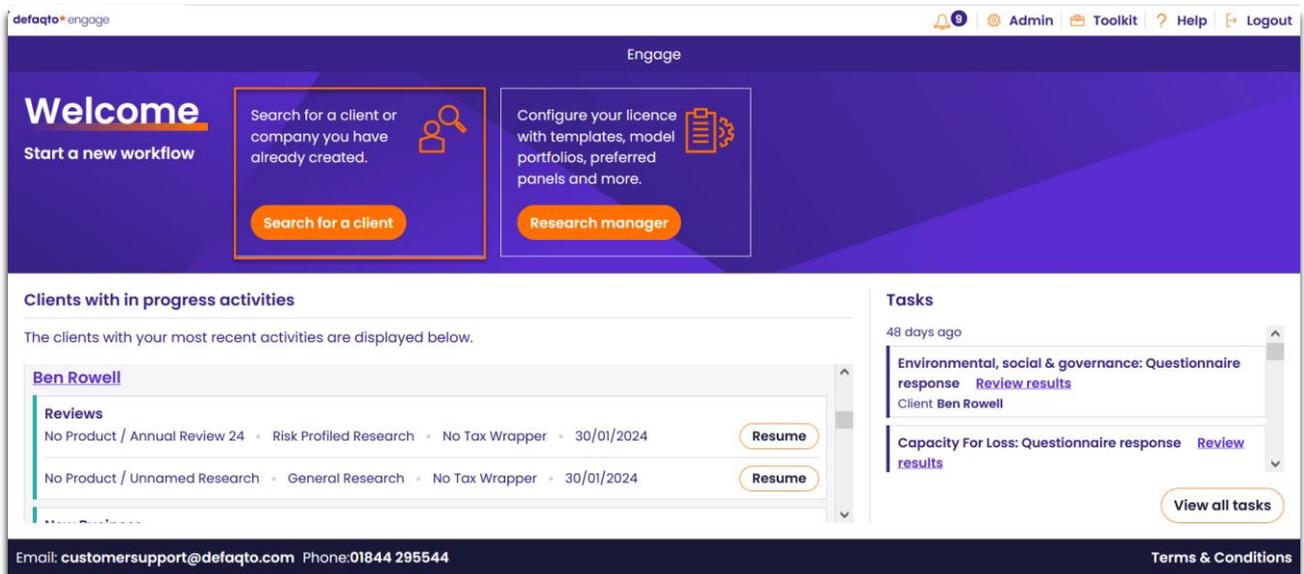
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Client details

To manually add a client to the system, click **Add a Client**.



If you are using the IO, Xplan or Plannr integration, your client's will automatically appear in the system. Click **Search for a client** and enter their name to bring up the client record.



If you have chosen to add a client, you will now complete the listed fields. Please note that any field marked with a red asterisk * are mandatory and must be completed to save the client record to the software.

The screenshot shows the 'Engage' client creation form in the defaqto software. The form is organized into several sections:

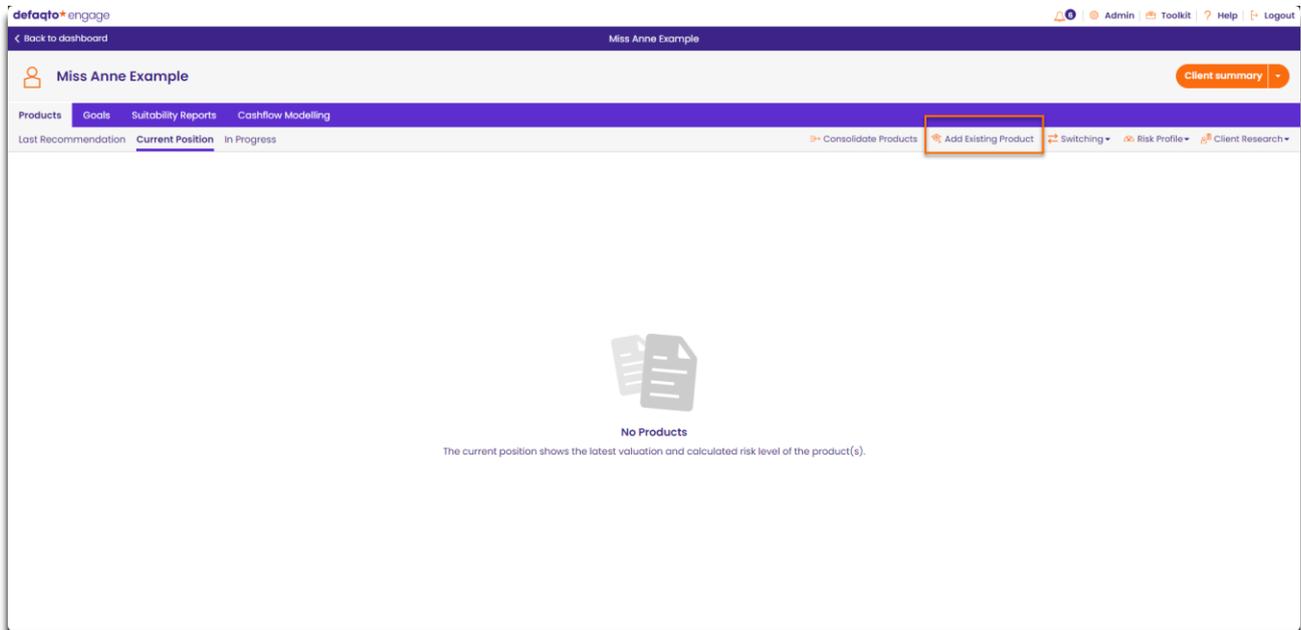
- Client owner:** A dropdown menu for 'Create client for' with 'Me' selected.
- Client type:** A dropdown menu for 'Person'.
- Contact details:**
 - Title ***: A text field containing 'Miss'.
 - First name ***: A text field containing 'Anne'.
 - Last name ***: A text field containing 'Example'.
 - Email address**: A text field with the placeholder 'Enter a email address'.
 - Reference**: A text field with the placeholder 'Enter a reference'.
 - Month and year of birth**: Two text fields for 'MM' and 'YYYY'.
 - Gender ***: A dropdown menu with 'Female' selected.
- Address:**
 - Address Line 1**: A text field with the placeholder 'Enter a address line 1'.
 - Address Line 2**: A text field with the placeholder 'Enter a address line 2'.
 - Town**: A text field.
 - County**: A text field.

At the bottom right of the form, there are two buttons: 'Cancel' and 'Save'.

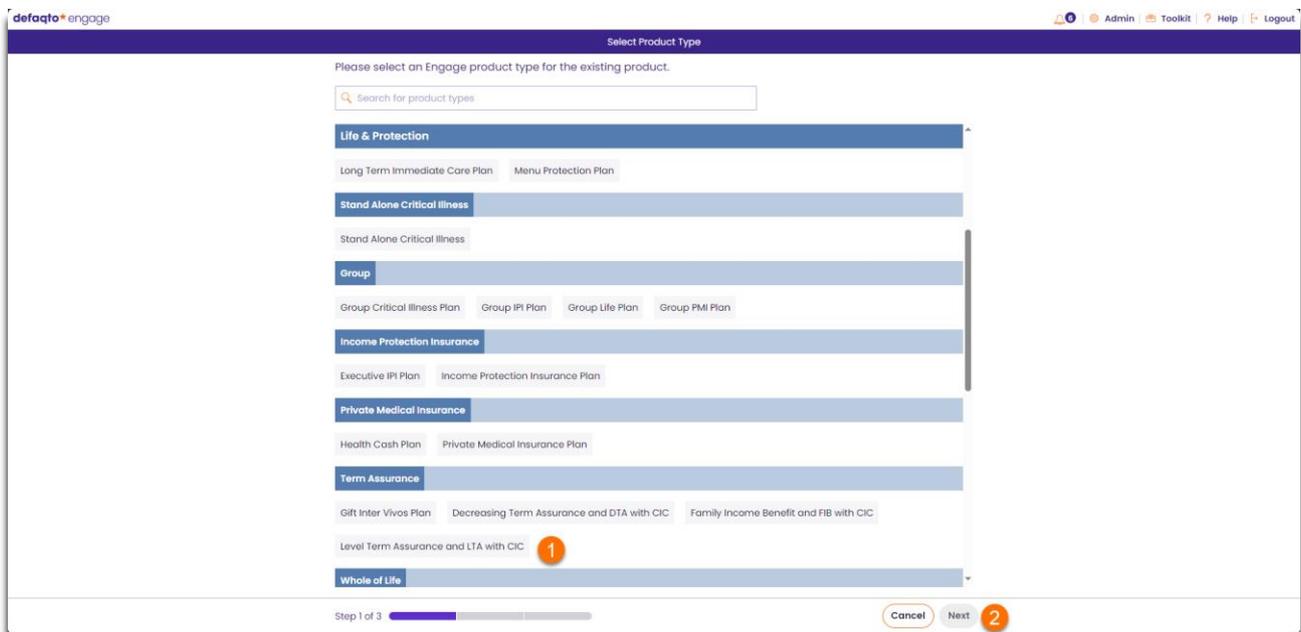
Once you have finished entering your client's details, click **Save**.

Adding an Existing Product

If you are using the Intelligent Office integration, your client's existing plans will automatically be linked to the client record and you can proceed with your analysis (see page 9). Alternatively, you can add your client's existing policy by clicking **Add Existing Product**.



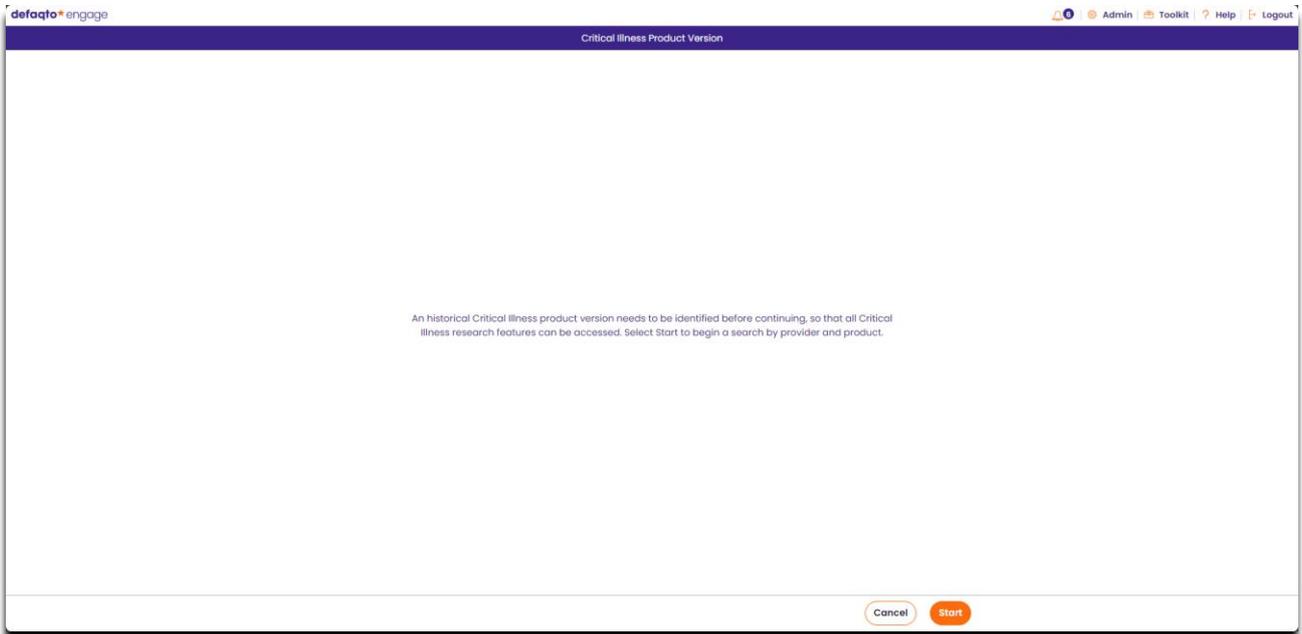
Now select the relevant product type and click **Next**.



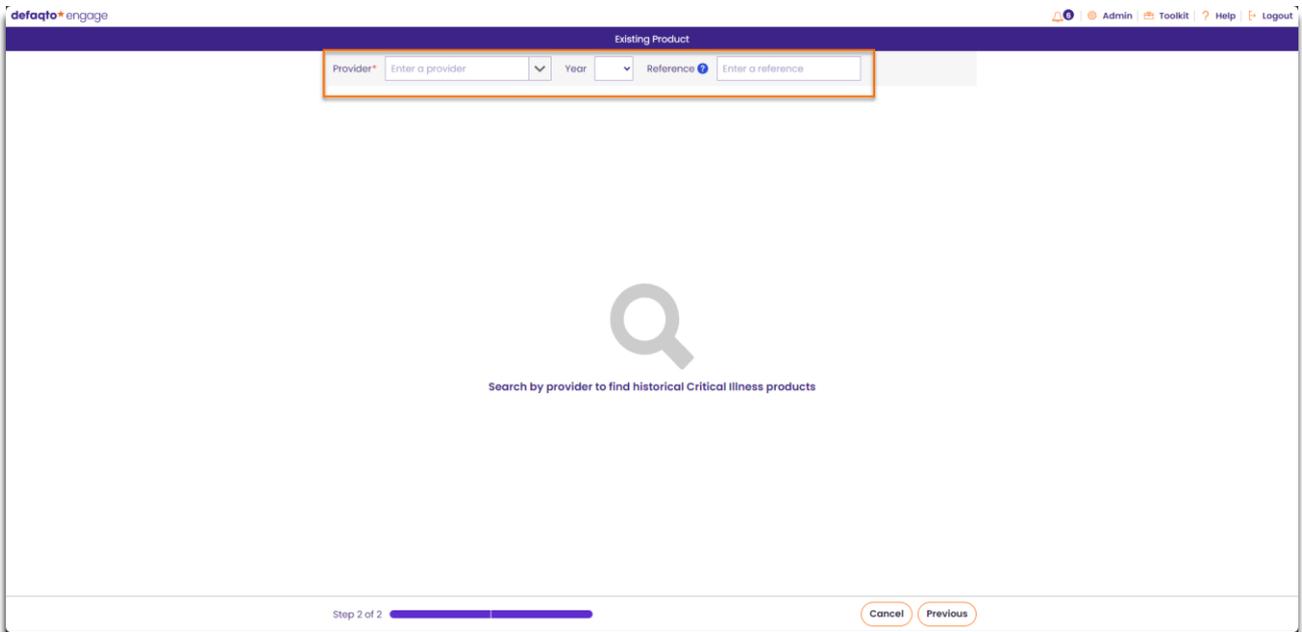
CIC Compare analysis is available in the following areas:

- Stand Alone Critical Illness
- Level Term Assurance and LTA with CIC
- Decreasing Term Assurance and DTA with CIC

Engage will then prompt you to find your client's existing product. To begin your search, click **Start**.

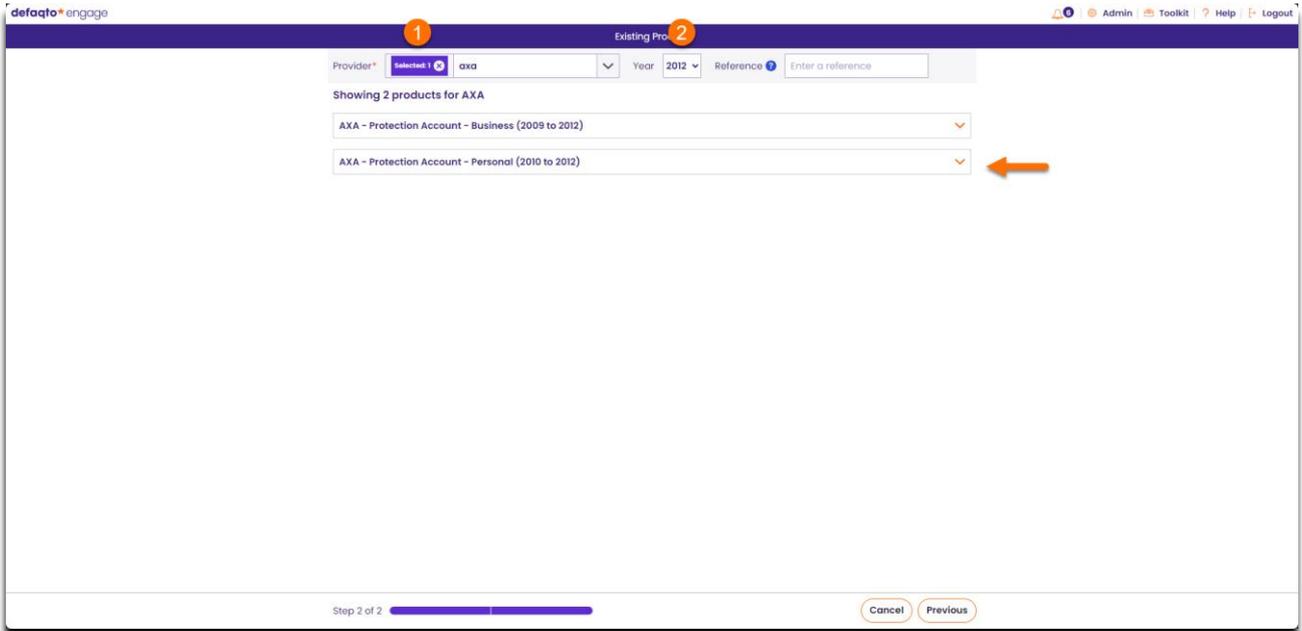


Now use the displayed dropdowns to search for your client's existing policy.



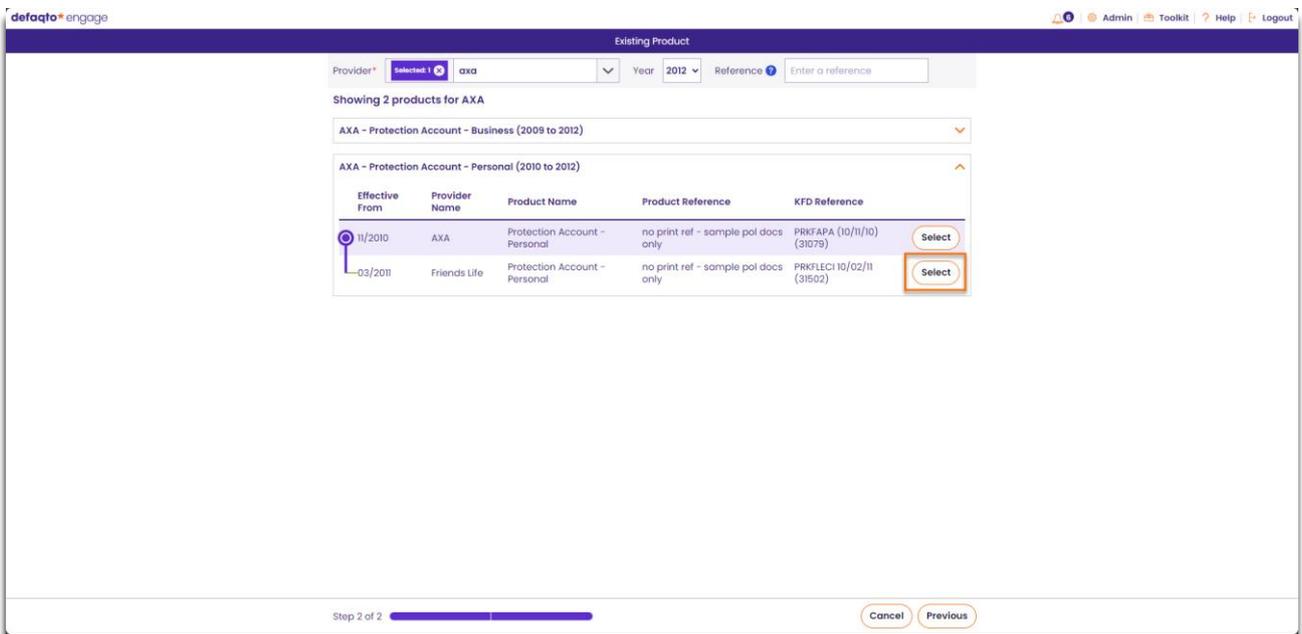
You can start to search for your client's current policy by first entering the provider name, then the year your client's current policy was issued and whenever possible, by entering the policies key facts document (KFD) reference number.

Please note the KFD reference is different to your client's policy number and will be displayed on the key facts document issued by your client's insurer.

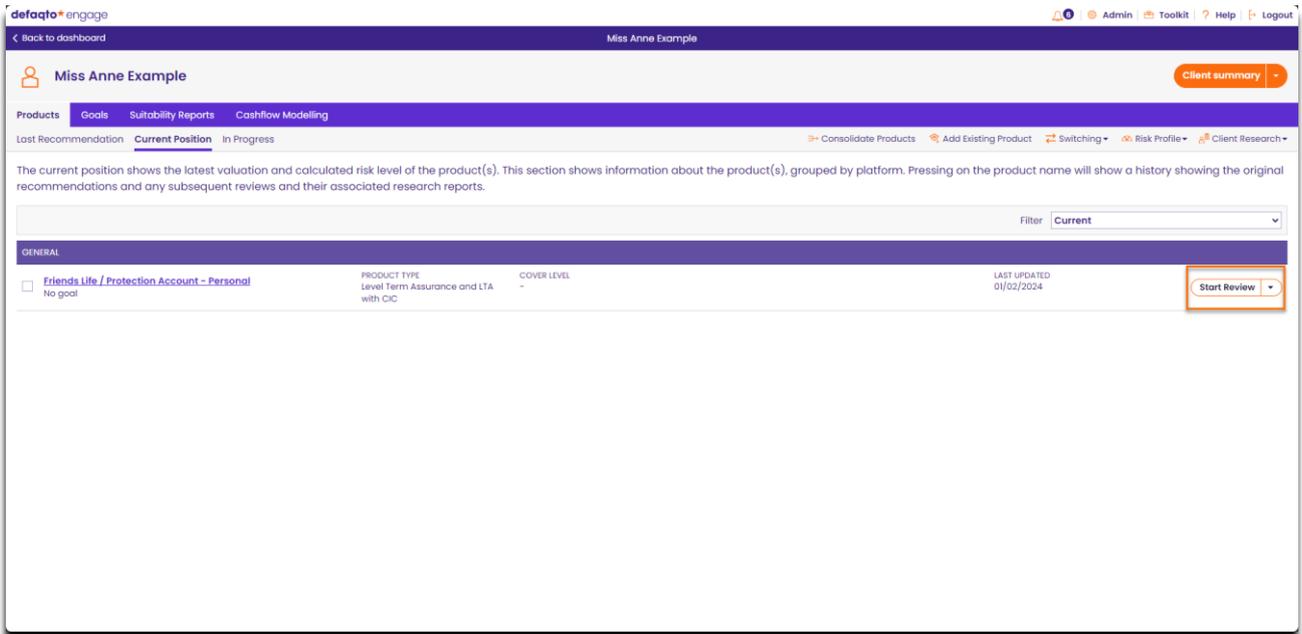


By entering your client's existing policy information, the system will return a set of policies that match your search criteria. If you have searched by the policies KFD reference number, you will immediately be presented with your client's current policy.

Each set of results can be expanded to allow you to select your client's current policy.

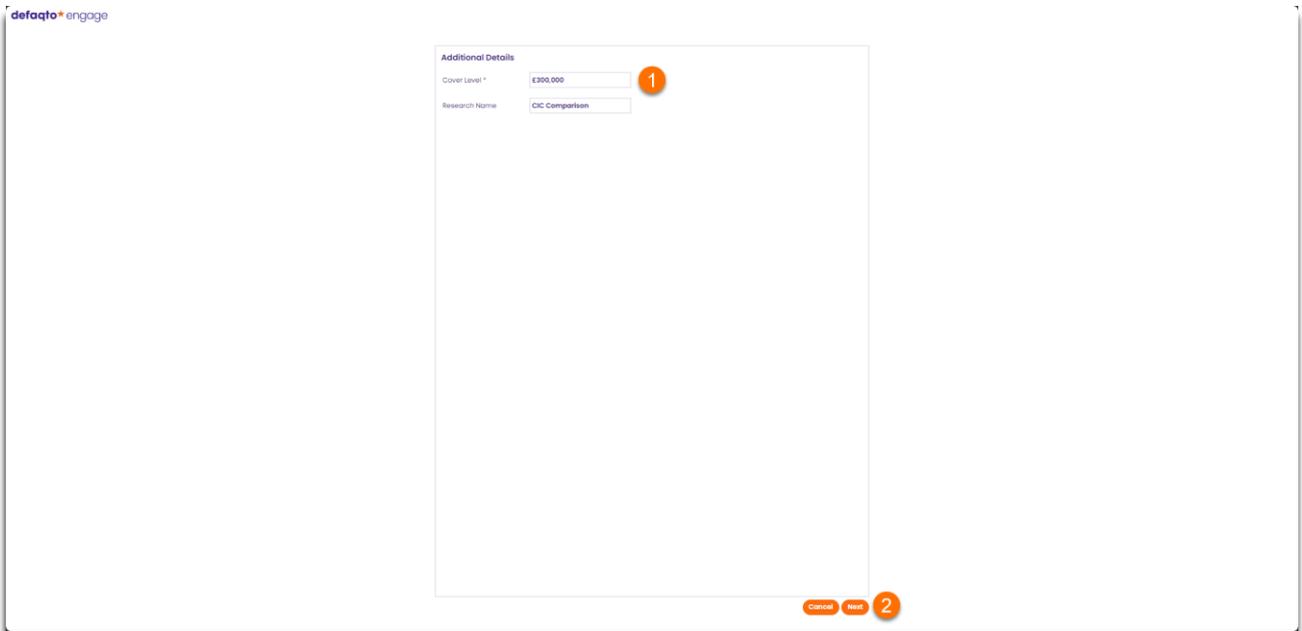


By clicking **Select**, you will have completed the process of adding your client's existing policy to the software. You will return to your client record and under **Current Position** you will see your client's existing CIC policy.



To start comparing the client's existing policy against other policies available today, click **Start Review**.

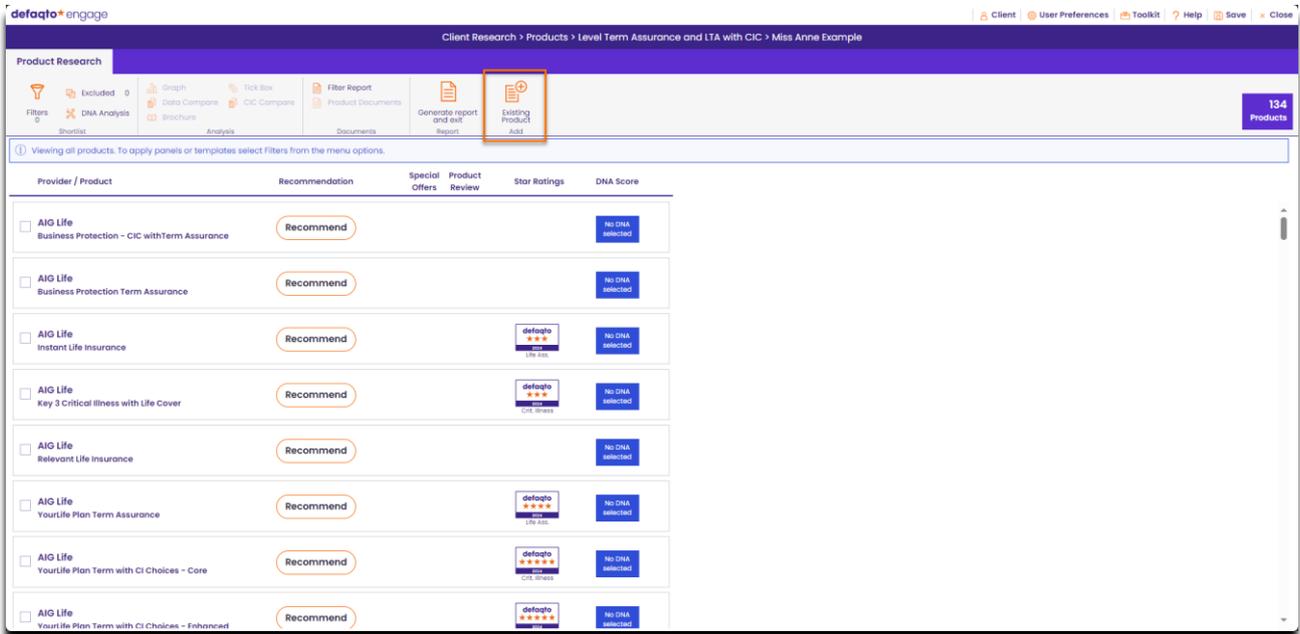
Enter how much the client is insured for and add a research name (optional).



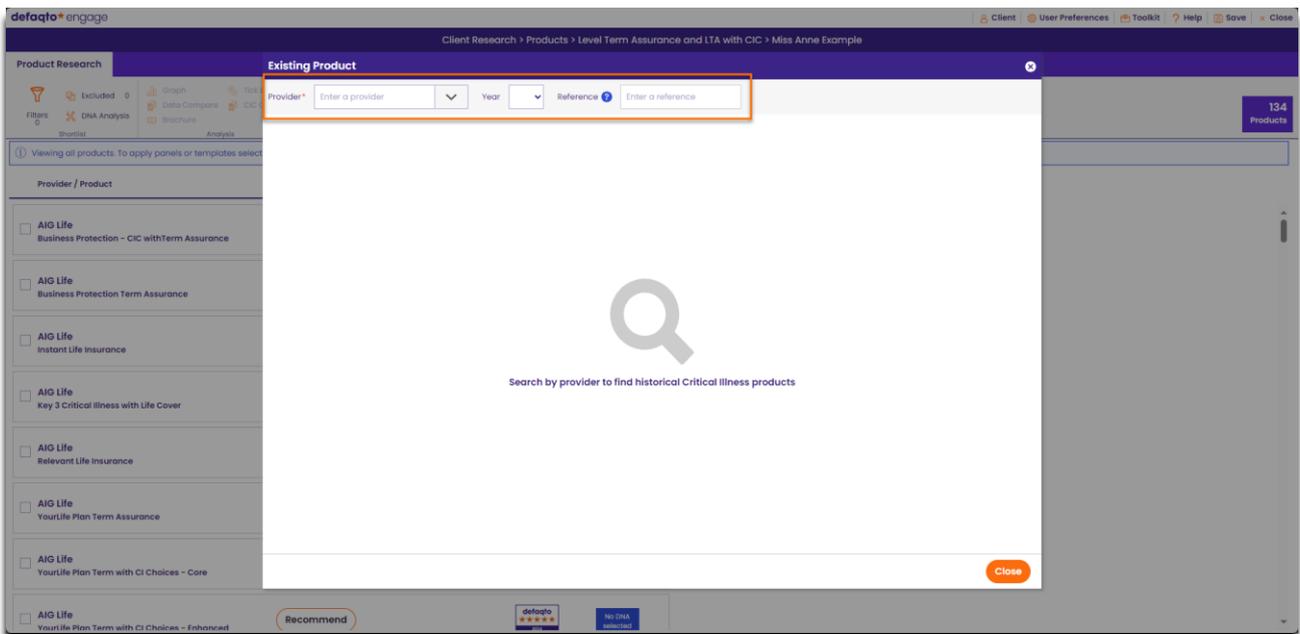
Then click **Next** to launch the research session.

Product shortlist

You are now presented with an alphabetical shortlist of all the current policies available in the market today.



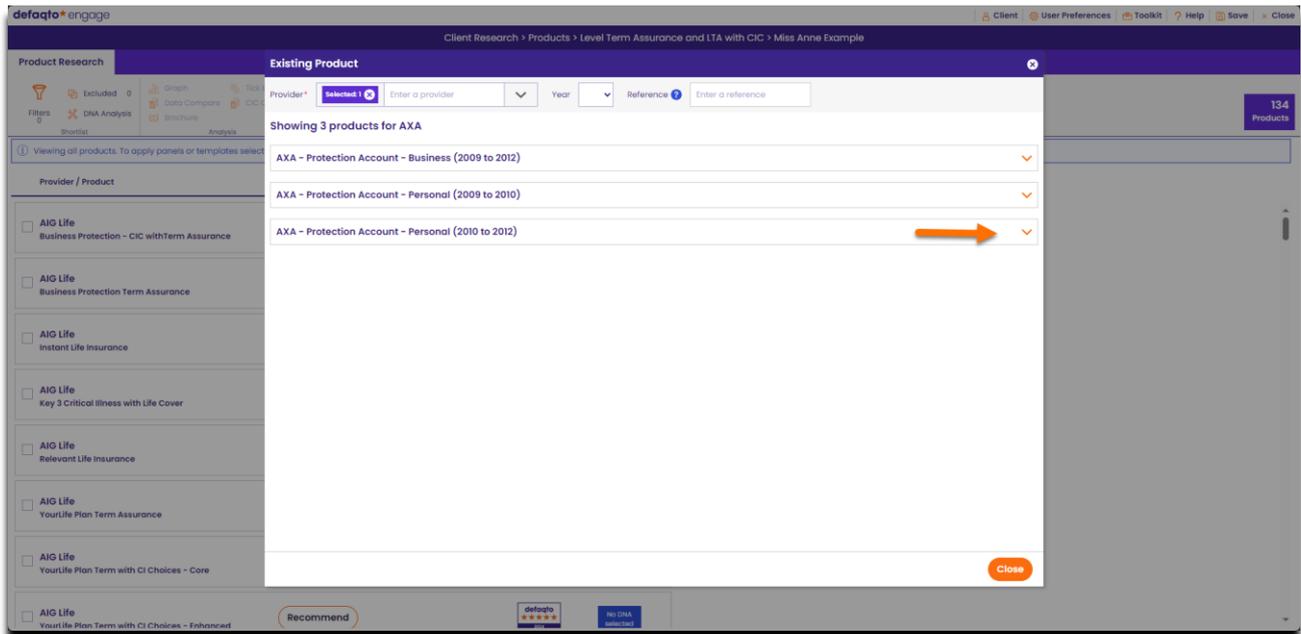
To add your client's existing policy to the shortlist, click **Existing Products**.



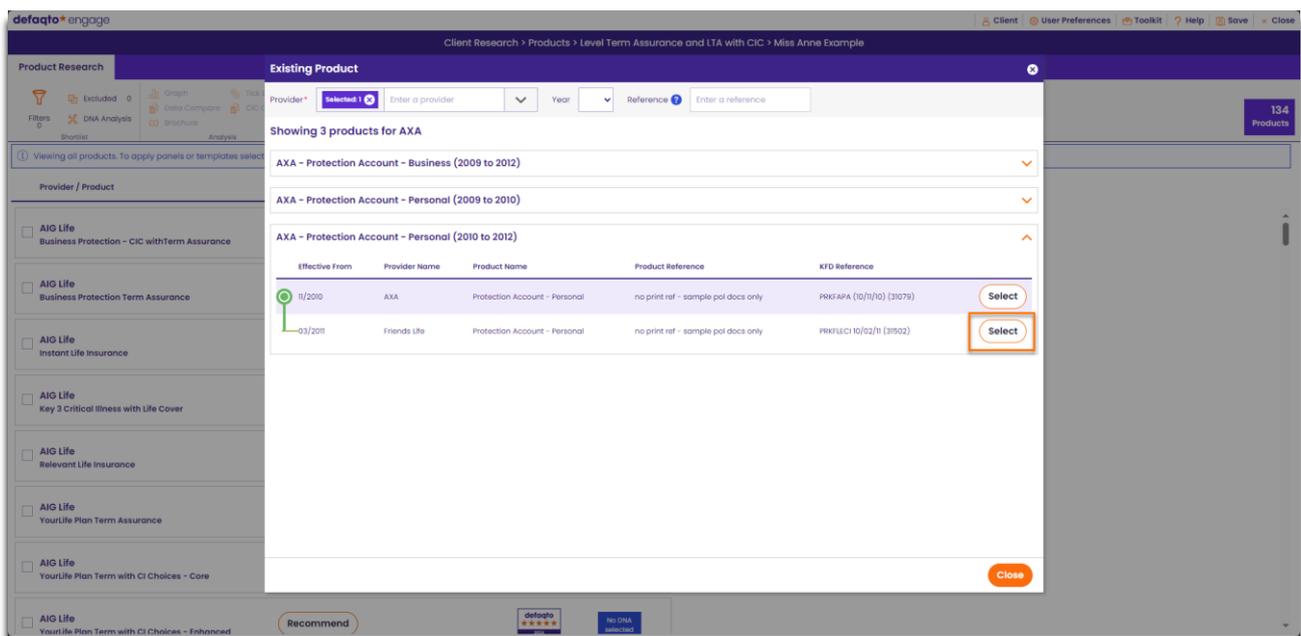
By using the displayed dropdowns, you can search for your client's current policy by entering the provider name, the year your client's current policy was issued and whenever possible, entering the policies key facts document (KFD) reference number.

Please note the KFD reference is different to your client's policy number and will be displayed on the key facts document issued by your client's insurer.

By entering your client's existing policy information, the system will return a set of policies that match your search criteria. If you have searched by the policies KFD reference number, you will immediately be presented with your client's current policy.

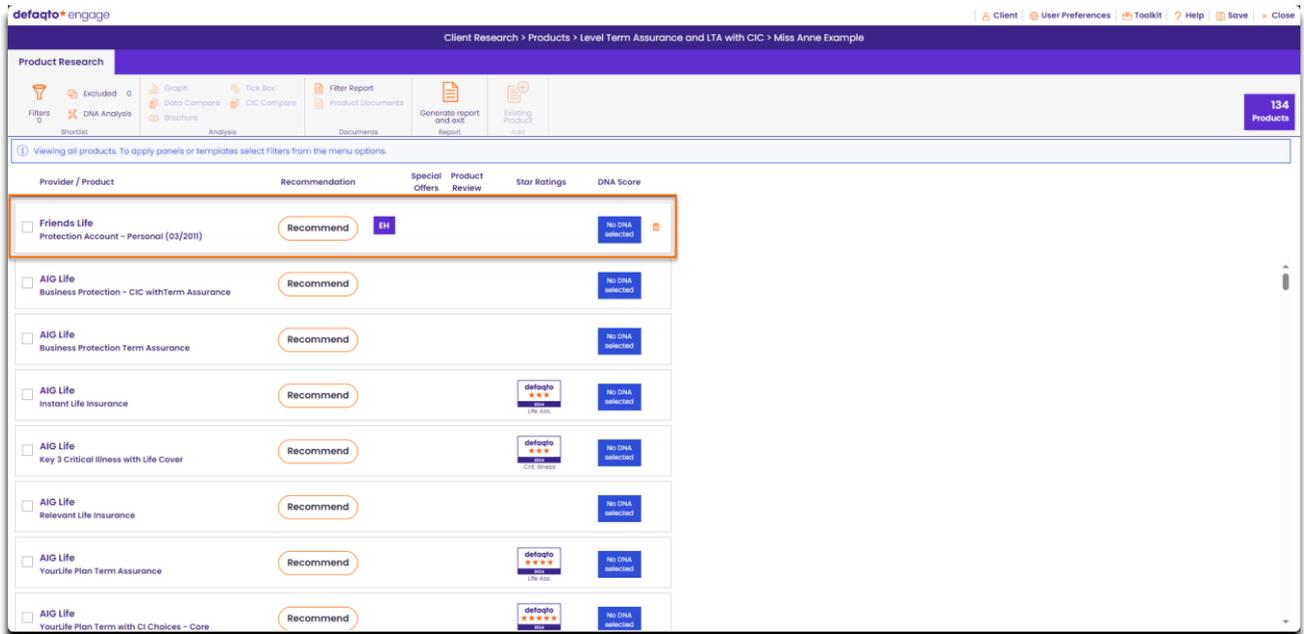


Each set of results can be expanded to allow you to select your client's current policy.

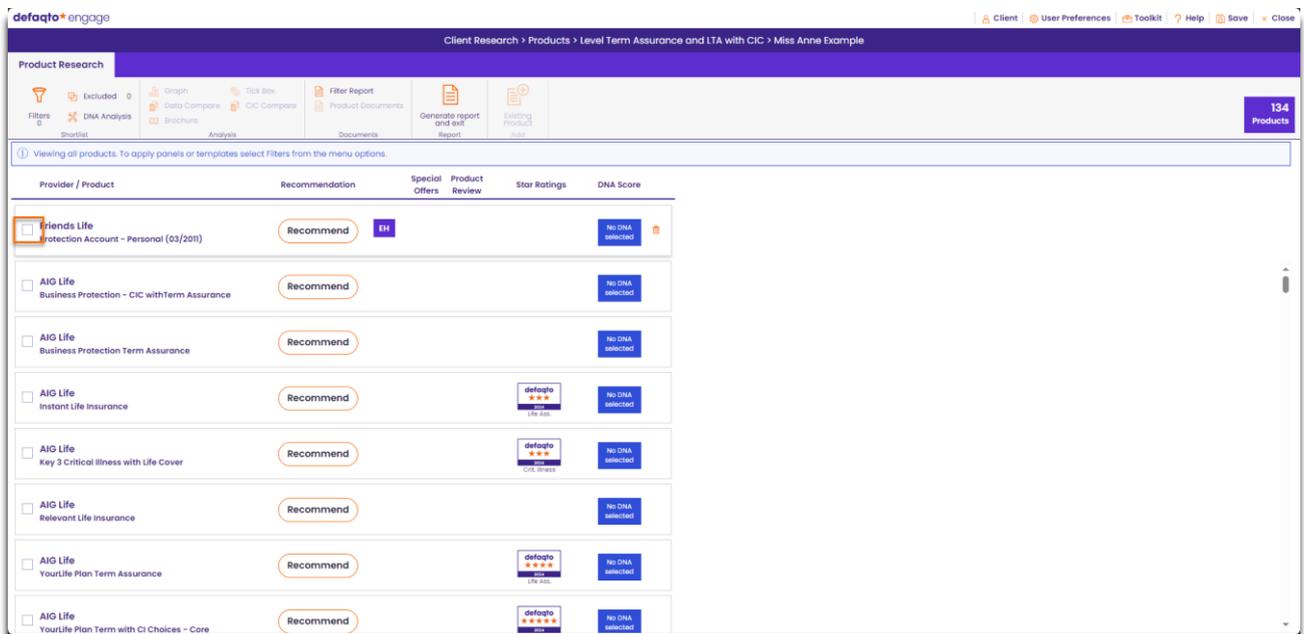


By clicking **Select**, you then return to the product shortlist.

Your client's existing policy is now displayed at the top of the shortlist.

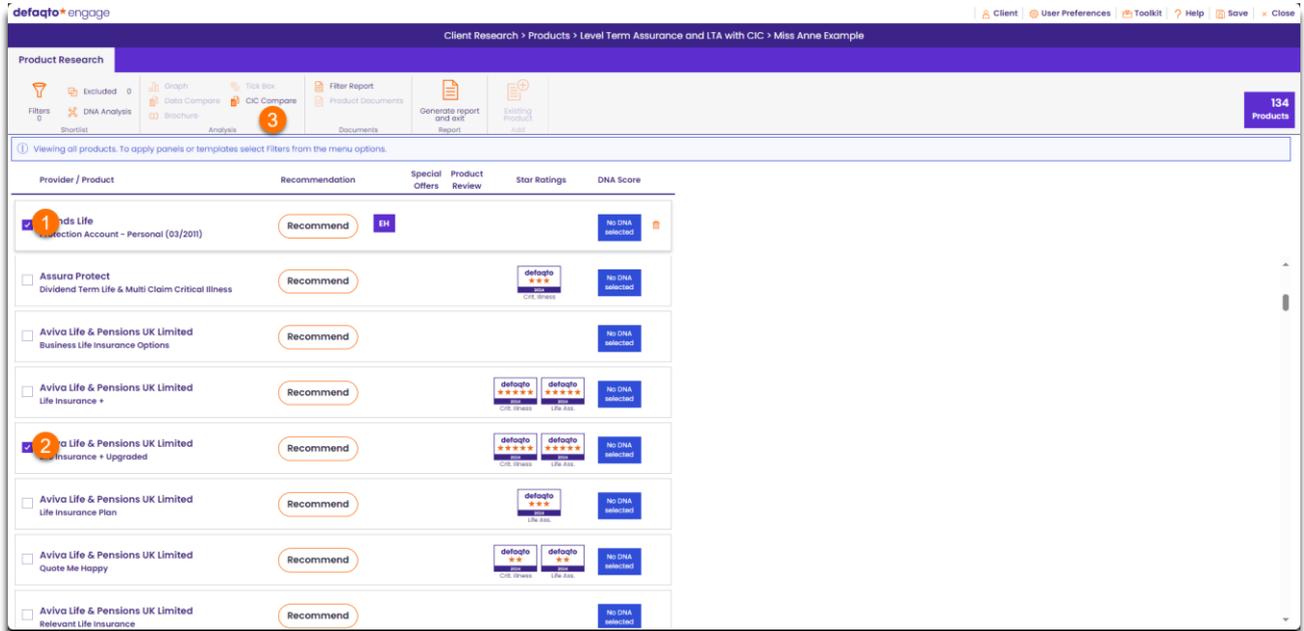


To compare your client's current policy against a potential new policy, place a tick against your client's existing policy.

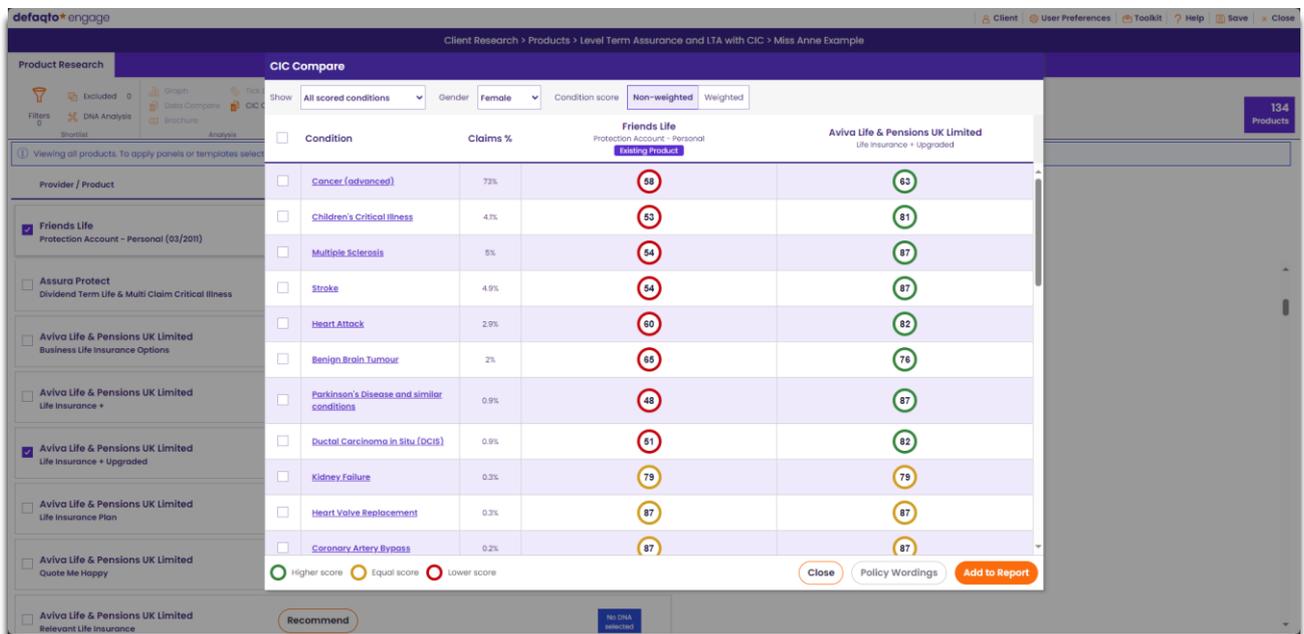


Now place a tick against the new policy you wish to compare the existing policy against.

As you scroll down the shortlist, your client's existing policy is frozen, so it is always visible. Once both policies have been selected, click **CIC Compare**.



The system will then create a score comparison of the two selected policies.



CIC Compare

Defaqto has partnered with independent experts in assessing the quality of critical illness definitions to create our RAG (Red, Amber, Green) scoring methodology.

Non-weighted scores

35 conditions have been scored (including conditions set out in the current ABI guidelines), so each condition is given a score out of a maximum score of 100. The closer the score is to 100, the better the definition. The listed scored conditions relate to 99% of claims.

If one policies condition score is higher than its counterpart, the score is highlighted in green. If both policies achieve the same score for a condition, both scores are highlighted in amber. If one policies condition score is lower than its counterpart, the score is highlighted in red. If no score is showing, the condition does not relate to your client's specified gender.

Condition	Claims %	Friends Life	Aviva Life & Pensions UK Limited
<input type="checkbox"/> Cancer (advanced)	73%	58	63
<input type="checkbox"/> Children's Critical Illness	4%	53	81
<input type="checkbox"/> Multiple Sclerosis	5%	54	87
<input type="checkbox"/> Stroke	4.9%	54	87
<input type="checkbox"/> Heart Attack	2.9%	60	82
<input type="checkbox"/> Benign Brain Tumour	2%	65	76
<input type="checkbox"/> Parkinson's Disease and similar conditions	0.9%	48	87
<input type="checkbox"/> Ductal Carcinoma in Situ (DCIS)	0.9%	51	82
<input type="checkbox"/> Kidney Failure	0.3%	79	79
<input type="checkbox"/> Heart Valve Replacement	0.3%	87	87
<input type="checkbox"/> Coronary Artery Bypass	0.2%	87	87

Legend: ● Higher score, ● Equal score, ● Lower score

Weighted scores

The comparison defaults to non-weighted scores. By clicking **Weighted**, the scores will change to display a new score that is weighted in accordance with the recent claims percentage for your client's specified gender.

A total score is also provided to measure the policy coverage overall. This indicates which policy has the overall best critical illness definitions based on your client's gender.

Condition	Claims %	Friends Life Protection Account - Personal Existing Product	Aviva Life & Pensions UK Limited Life Insurance - Upgraded
<input type="checkbox"/> Cancer (advanced)	73%	42	46
<input type="checkbox"/> Children's Critical Illness	4%	2	3
<input type="checkbox"/> Multiple Sclerosis	5%	3	4
<input type="checkbox"/> Stroke	4.9%	3	4
<input type="checkbox"/> Heart Attack	2.9%	2	2
<input type="checkbox"/> Benign Brain Tumour	2%	1	2
<input type="checkbox"/> Parkinson's Disease and similar conditions	0.9%	45	78
<input type="checkbox"/> Ductal Carcinoma in Situ (DCIS)	0.9%	46	74
<input type="checkbox"/> Kidney Failure	0.3%	24	24
<input type="checkbox"/> Heart Valve Replacement	0.2%	26	26
Total weighted score for Female		57.1	65.9

Legend: ● Higher score ● Equal score ● Lower score

Buttons: [Close](#) [Policy Warnings](#) [Add to Report](#)

When conducting an assessment, the overall weighted gender scores should be used in conjunction with the individual condition scores that are relevant to the client and their family history of illness.

The list of conditions defaults to the most prevalent conditions for your client's gender. This can be changed by selecting the **Gender** dropdown and selecting **Unspecified**. This changes any weighting and ordering applied to show a list of conditions based on combined male and female claim percentages. Click **Add to Report** to add your score comparisons to the final report.

Client Research > Products > Level Term Assurance and LTA with CIC > Miss Anne Example

Product Research

CIC Compare

Show: All scored conditions Gender: Female Condition score: Non-weighted Weighted

Condition	Claims %	Friends Life Protection Account - Personal Existing Product	Aviva Life & Pensions UK Limited Life Insurance + Upgraded
<input type="checkbox"/> Cancer (advanced)	73%	42	46
<input type="checkbox"/> Children's Critical Illness	4%	2	3
<input type="checkbox"/> Multiple Sclerosis	5%	3	4
<input type="checkbox"/> Stroke	4.9%	3	4
<input type="checkbox"/> Heart Attack	2.9%	2	2
<input type="checkbox"/> Benign Brain Tumour	2%	1	2
<input type="checkbox"/> Parkinson's Disease and similar conditions	0.9%	43	78
<input type="checkbox"/> Ductal Carcinoma in Situ (DCIS)	0.9%	46	74
<input type="checkbox"/> Kidney Failure	0.3%	24	24
<input type="checkbox"/> Heart Valve Replacement	0.3%	26	26
Total weighted score for Female		57.1	65.9

Legend: Higher score (Green), Equal score (Yellow), Lower score (Red)

Buttons: Close, Policy Wordings, Add to Report, Recommend

Over 100 non scored conditions are also showcased in the final report which will show whether a condition is included or excluded under the compared policies. You can **Show** the superior levels of cover offered by the two policies in your comparison.

Client Research > Products > Level Term Assurance and LTA with CIC > Miss Anne Example

Product Research

CIC Compare

Show: All scored conditions Gender: Female Condition score: Non-weighted Weighted

All scored conditions

Superior cover for Friends Life Protection Account - Personal

Superior cover for Aviva Life & Pensions UK Limited Life Insurance + Upgraded

Lost cover with Aviva Life & Pensions UK Limited Life Insurance + Upgraded

Condition	Claims %	Friends Life Protection Account - Personal Existing Product	Aviva Life & Pensions UK Limited Life Insurance + Upgraded
<input type="checkbox"/> Cancer (advanced)	73%	42	46
<input type="checkbox"/> Children's Critical Illness	4%	2	3
<input type="checkbox"/> Multiple Sclerosis	5%	3	4
<input type="checkbox"/> Stroke	4.9%	3	4
<input type="checkbox"/> Heart Attack	2.9%	2	2
<input type="checkbox"/> Benign Brain Tumour	2%	1	2
<input type="checkbox"/> Parkinson's Disease and similar conditions	0.9%	43	78
<input type="checkbox"/> Ductal Carcinoma in Situ (DCIS)	0.9%	46	74
<input type="checkbox"/> Kidney Failure	0.3%	24	24
<input type="checkbox"/> Heart Valve Replacement	0.3%	26	26
Total weighted score for Female		57.1	65.9

Legend: Higher score (Green), Equal score (Yellow), Lower score (Red)

Buttons: Close, Policy Wordings, Add to Report, Recommend

You can also use the dropdown to easily identify which current covered conditions would be lost by switching to the new policy. By clicking on the name of a condition, you will be given a description of the illness.

The screenshot shows the 'CIC Compare' interface. A table lists various conditions with their respective claims percentages and scores for two providers: Friends Life and Aviva Life & Pensions UK Limited. The 'Cancer (advanced)' condition is selected with a tick box. The 'Policy Wordings' button is highlighted in orange.

Condition	Claims %	Friends Life	Aviva Life & Pensions UK Limited
<input checked="" type="checkbox"/> Cancer (advanced)	73%	42	46
<input type="checkbox"/> Children's Critical Illness	4.1%	2	3
<input type="checkbox"/> Multiple Sclerosis	5%	3	4
<input type="checkbox"/> Stroke	4.9%	3	4
<input type="checkbox"/> Heart Attack	2.9%	2	2
<input type="checkbox"/> Benign Brain Tumour	2%	1	2
<input type="checkbox"/> Parkinson's Disease and similar conditions	0.9%	43	78
<input type="checkbox"/> Ductal Carcinoma in Situ (DCIS)	0.9%	46	74
<input type="checkbox"/> Kidney Failure	0.3%	24	24
<input type="checkbox"/> Heart Valve Replacement	0.3%	26	26
Total weighted score for Female		57.1	65.9

By placing ticks against listed conditions and clicking **Policy Wordings**, you will be able to view the critical illness definition of your selected condition.

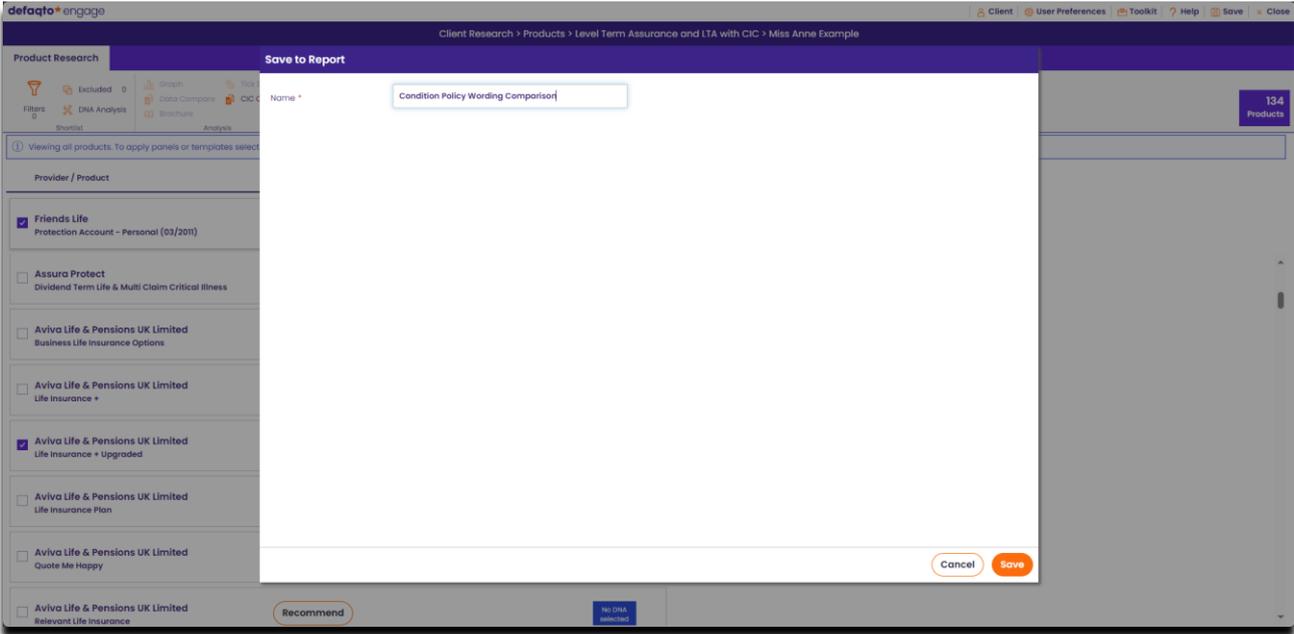
Click **Add condition to report** to add the definitions to your final research report. Please note that any scored condition will automatically have their definitions included as standard in the final report.

The screenshot shows the 'Policy Wordings' interface for the selected condition 'Cancer (advanced)'. It displays the detailed definitions for both Friends Life and Aviva Life & Pensions UK Limited. The 'Add condition to report' button is highlighted in orange.

Friends Life
 Cancer - excluding less advanced cases
 Any malignant tumour positively diagnosed with histological confirmation and characterised by the uncontrolled growth of malignant cells and invasion of tissue. The term malignant tumour includes leukaemia, lymphoma and sarcoma.
 For the above definition, the following are not covered:
 All cancers which are histologically classified as any of the following:
 - pre-malignant;
 - non-invasive;
 - cancer in situ;
 - having either borderline malignancy; or
 - having low malignant potential.
 - All tumours of the prostate unless histologically classified as having a Gleason Score greater than 6 or having progressed to at least clinical TNM classification (T2b/c).
 - Chronic lymphocytic leukaemia unless histologically classified as having progressed to at least Binet Stage A.
 - Any skin cancer other than malignant melanoma that has been histologically classified as having caused invasion beyond the epidermis (outer layer of skin).

Aviva Life & Pensions UK Limited
 Cancer excluding less advanced cases.
 Any malignant tumour positively diagnosed with histological confirmation and characterised by the uncontrolled growth of malignant cells and invasion of tissue.
 The term malignant tumour includes:
 - Leukaemia
 - Sarcoma, and lymphoma except those that arise from and are confined to the skin (including cutaneous lymphomas and sarcomas)
 - Psudomyxoma peritonei
 - Merkel cell cancer
 The following are not covered:
 All cancers which are histologically classified as any of the following:
 - pre-malignant
 - non-invasive
 - cancer in situ
 - having borderline malignancy
 - having low malignant potential
 - All tumours of the prostate unless histologically classified as having a Gleason score of 7 or above or having progressed to at least TNM classification cT2b/cN0M0 or pT2b/cN0M0 following prostatectomy (removal of the prostate).
 - Neuroendocrine tumours without lymph node involvement or distant metastases unless classified as WHO Grade 2 or above.
 - Gastrointestinal stromal tumours without lymph node involvement or distant metastases unless classified by either ARIS/Miettinen and Lasota as having a moderate or high risk of progression or as ICC/Well stage II or above.
 - All urothelial tumours unless histologically classified as having progressed to at least TNM classification TN0M0.
 - Malignant melanoma skin cancer that is confined to the epidermis (outer layer of skin).
 - Any non-melanoma cancer that arises from or is confined to one or more of the epidermal, dermal, and subcutaneous tissue layers of the skin (including cutaneous lymphomas and sarcomas) unless it has spread to lymph nodes or distant organs.

Then click **Save** then click **Back**.



You will then return to your score comparison.

Once you finished analysing the policy condition scores, click **Close**. Remember to click **Add to Report** to ensure the score comparisons have been added to your final report.

Condition	Claims %	Friends Life Protection Account - Personal CIC Compare	Aviva Life & Pensions UK Limited Life Insurance - Upgraded
<input checked="" type="checkbox"/> Cancer (advanced)	73%	42	46
<input type="checkbox"/> Children's Critical Illness	4%	2	3
<input type="checkbox"/> Multiple Sclerosis	5%	3	4
<input type="checkbox"/> Stroke	4.9%	3	4
<input type="checkbox"/> Heart Attack	2.9%	2	2
<input type="checkbox"/> Benign Brain Tumour	2%	1	2
<input type="checkbox"/> Parkinson's Disease and similar conditions	0.9%	43	78
<input type="checkbox"/> Ductal Carcinoma in Situ (DCIS)	0.9%	46	74
<input type="checkbox"/> Kidney Failure	0.3%	24	24
<input type="checkbox"/> Heart Valve Replacement	0.3%	26	26
Total weighted score for Female		57.1	65.9

Legend: ● Higher score ● Equal score ● Lower score

Buttons: **Close** (highlighted), Policy Wordings, Add to Report

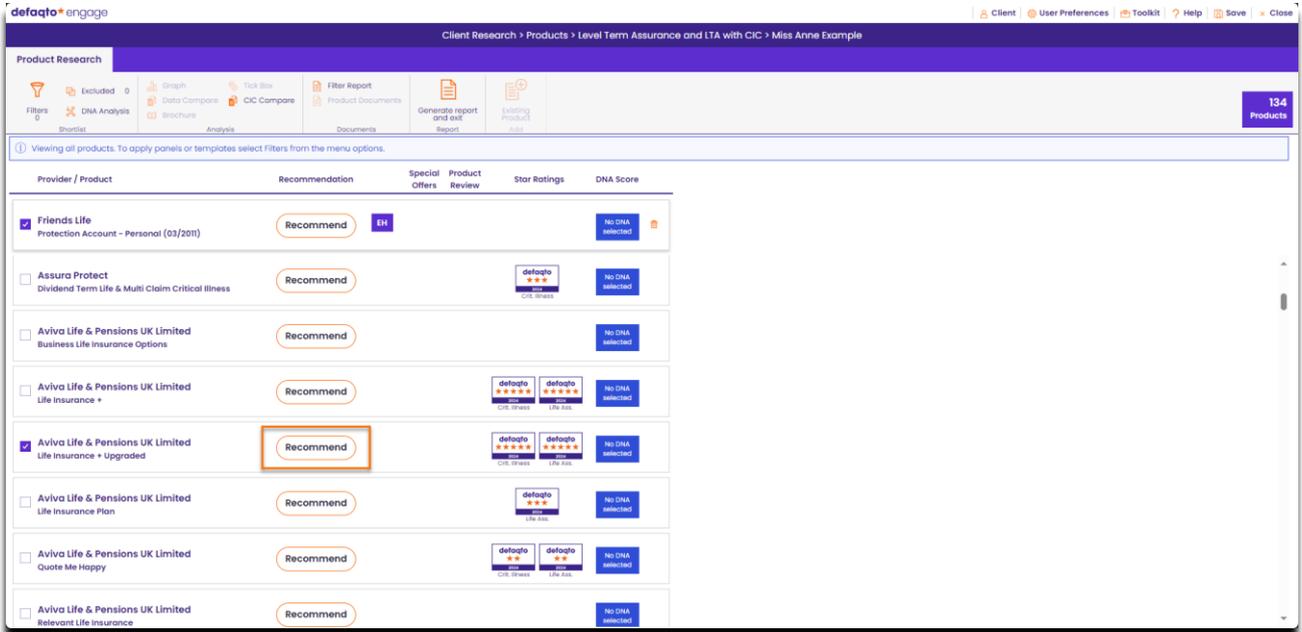
You then return to your product shortlist.

Provider / Product	Recommendation	Special Offers	Product Review	Star Ratings	DNA Score
<input checked="" type="checkbox"/> Friends Life Protection Account - Personal (03/2011)	Recommend	EA			No DNA selected
<input type="checkbox"/> Assura Protect Dividend Term Life & Multi Claim Critical Illness	Recommend				No DNA selected
<input type="checkbox"/> Aviva Life & Pensions UK Limited Business Life Insurance Options	Recommend				No DNA selected
<input type="checkbox"/> Aviva Life & Pensions UK Limited Life Insurance +	Recommend				No DNA selected
<input checked="" type="checkbox"/> Aviva Life & Pensions UK Limited Life Insurance - Upgraded	Recommend				No DNA selected
<input type="checkbox"/> Aviva Life & Pensions UK Limited Life Insurance Plan	Recommend				No DNA selected
<input type="checkbox"/> Aviva Life & Pensions UK Limited Quote Me Happy	Recommend				No DNA selected
<input type="checkbox"/> Aviva Life & Pensions UK Limited Relevant Life Insurance	Recommend				No DNA selected

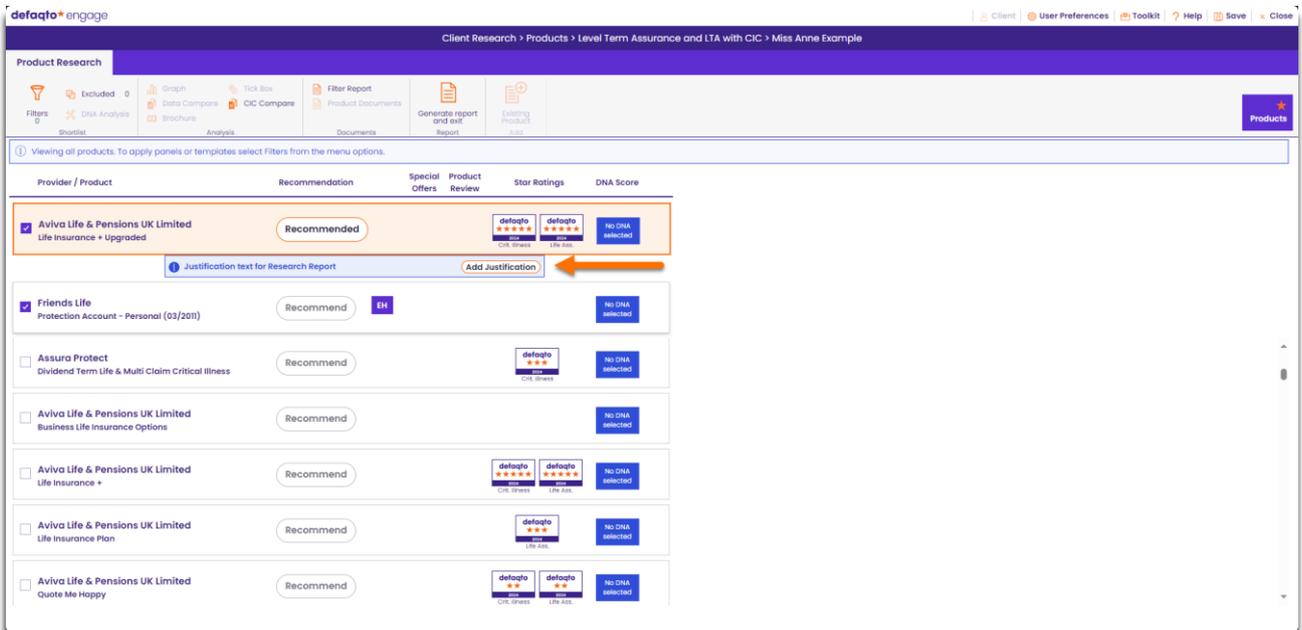
You now need to decide which policy you will recommend for your client.

Creating the final report

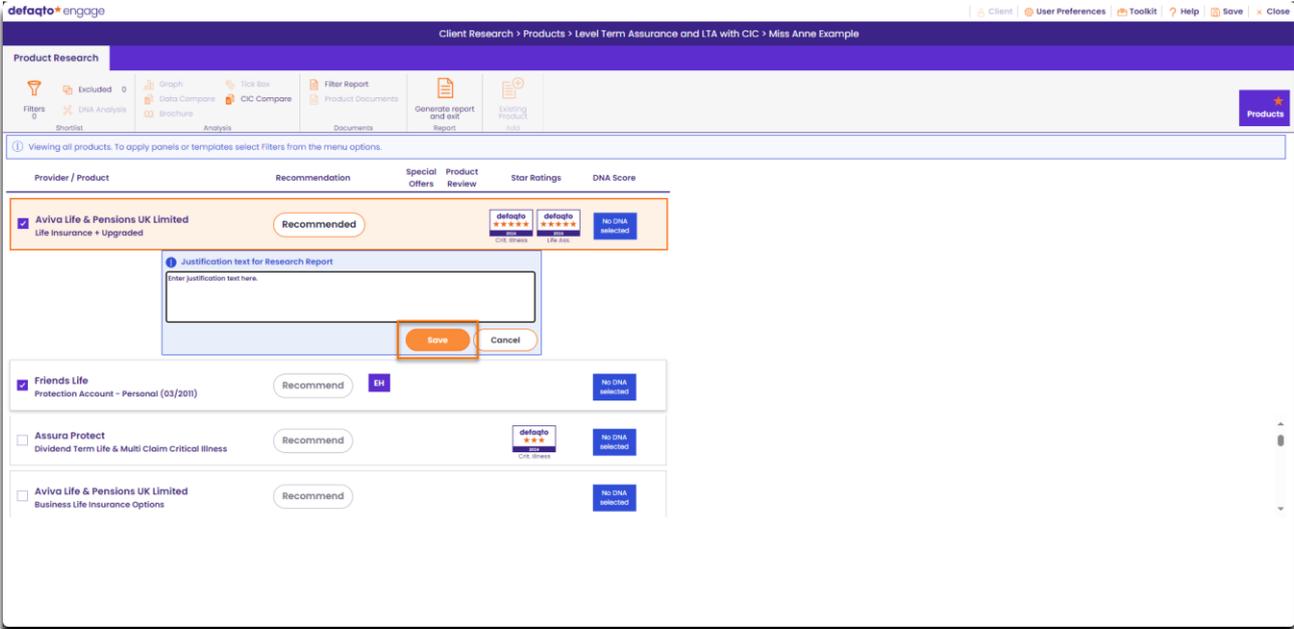
Once you have decided which policy to recommend, click the **Recommend** button located next to the name of the policy.



Your chosen policy will then turn gold and move to the top of the shortlist (if it is not already there).

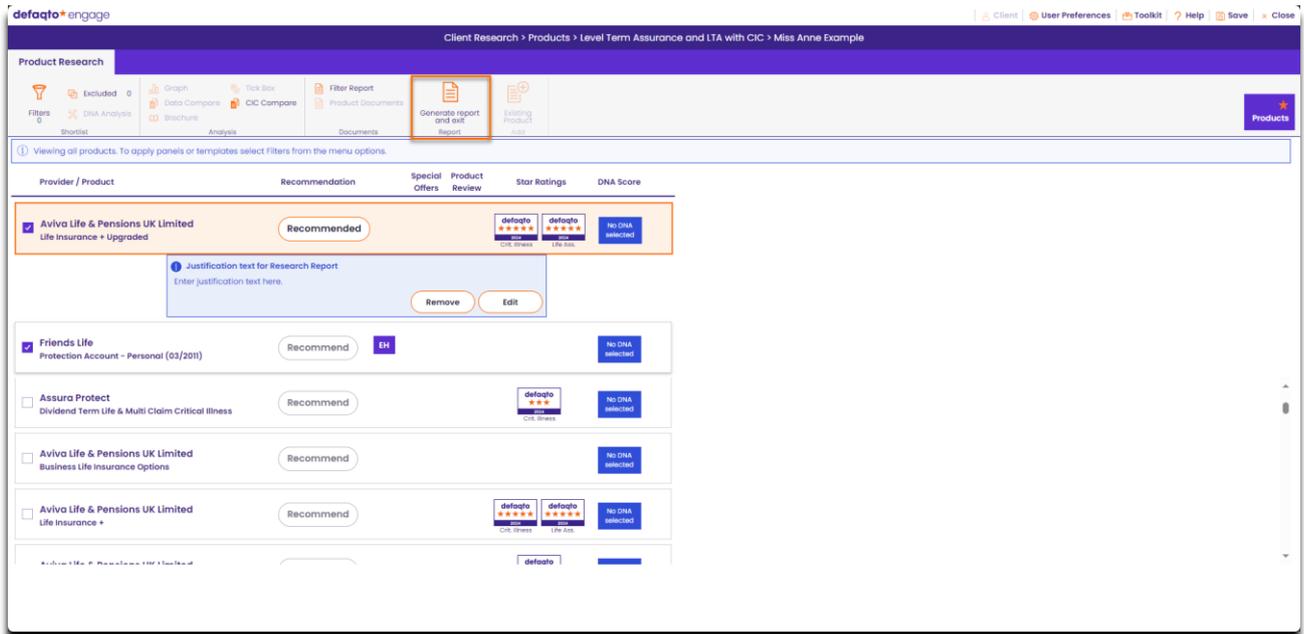


You can then choose to **Add Justification** text to the recommendation, however this is optional.

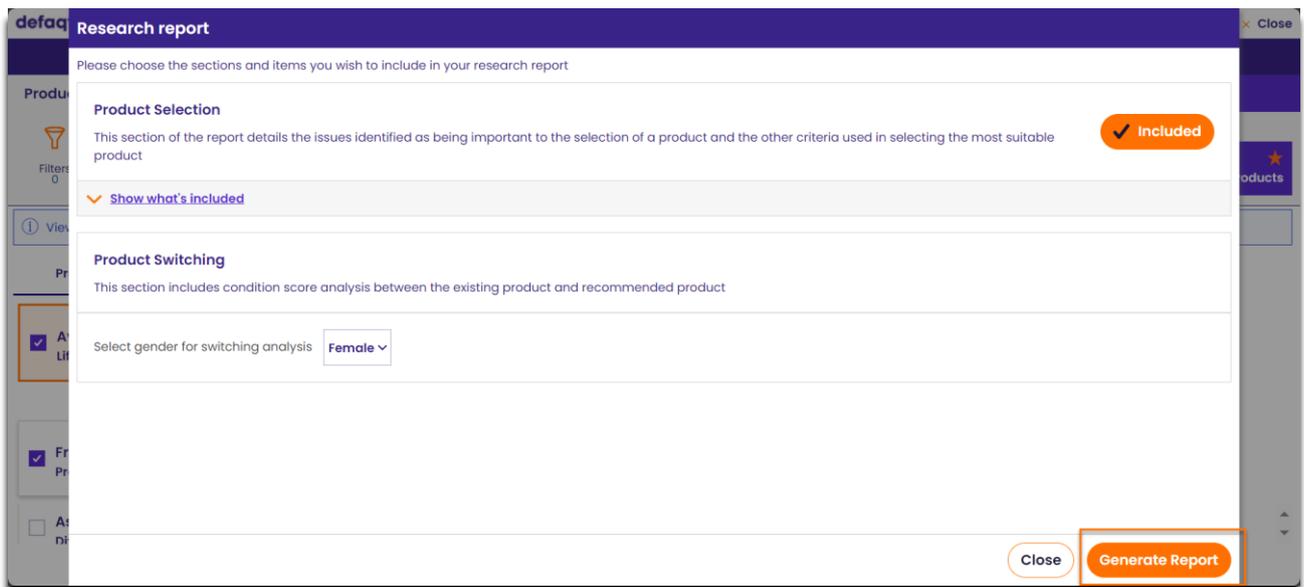


Click **Save** once you have added your justification to help explain your recommendation.

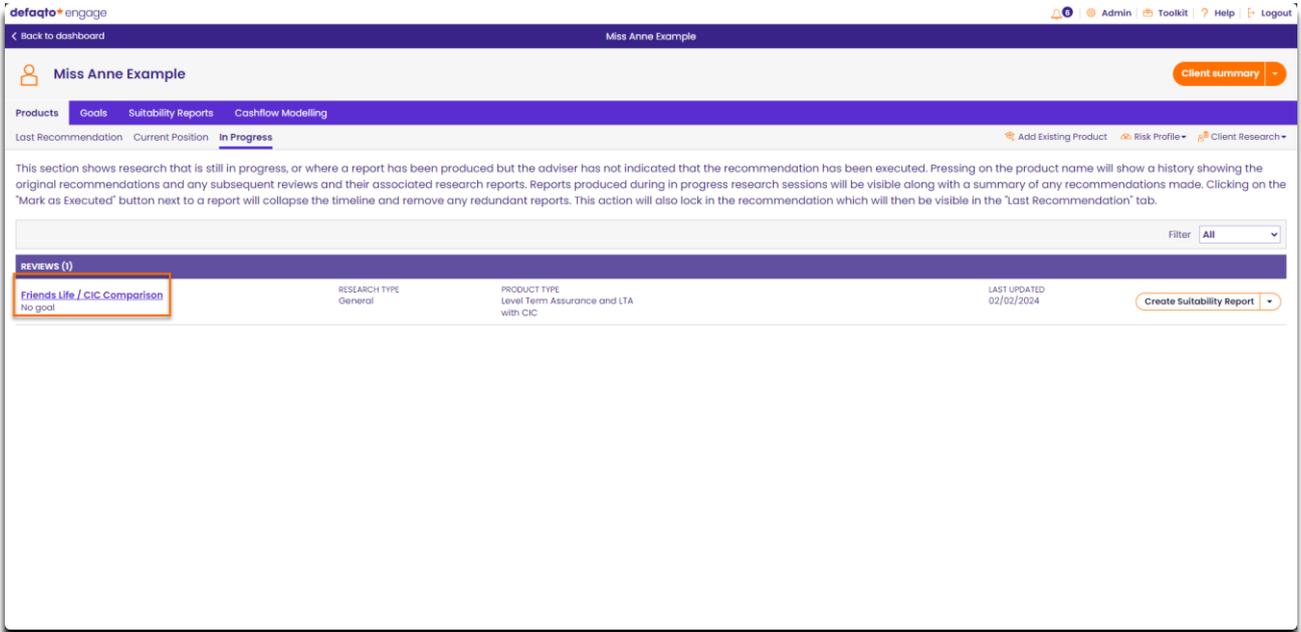
Now click **Generate report and exit** to create your research report.



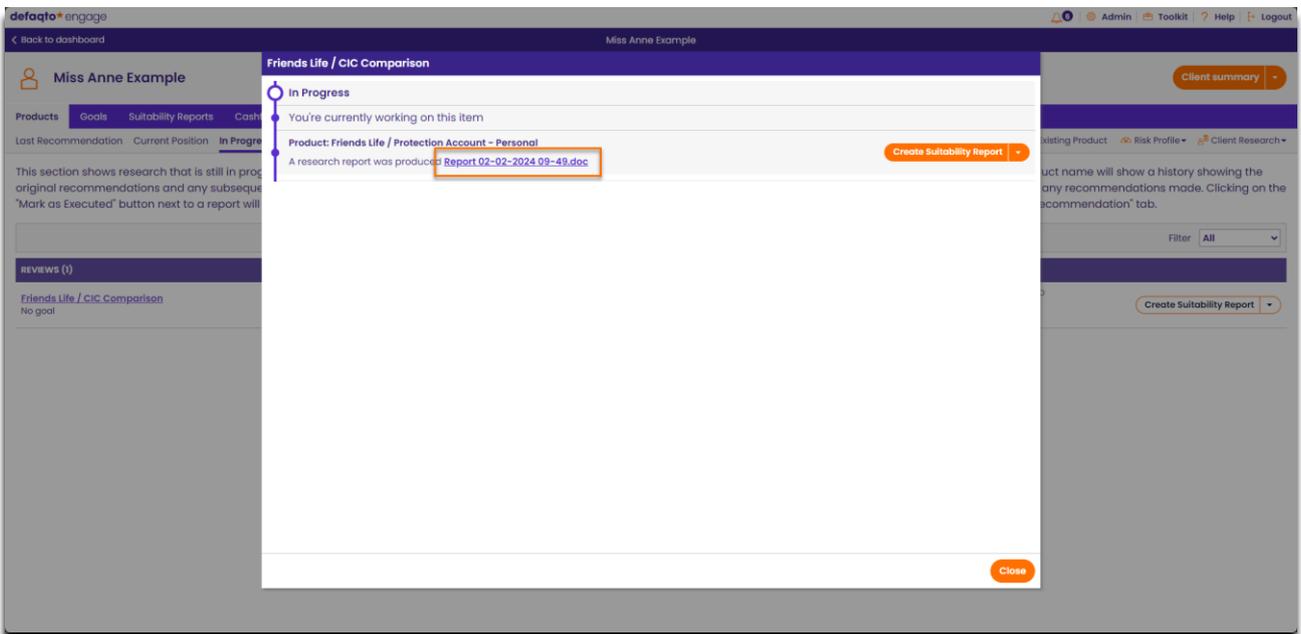
A report summary will screen will then load.



Once you are happy with the content of the report, click **Generate Report**.

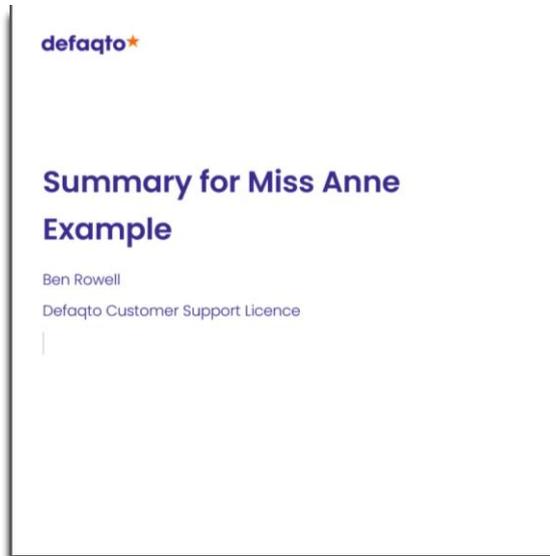


You can download the research report by clicking into the name of the research.



From the timeline you can access the research report.

Research report summary



The first few pages of the report will show a summary of the policies that have been compared in the system.

Recommendation

Cover level: £300,000

Product Switching

Analysis was undertaken on 1 Feb 2024 to compare the level of cover for critical illness conditions in your current policy with that of a recommended new product. The main part of the analysis has been undertaken by comparing scores representing the level of cover provided by the policy combined with the likelihood of the policyholder being able to make a claim based on the policy wording. These scored conditions listed in the 'All Scored Conditions' section, which represent the majority of historic claims made on critical illness policies.

Critical illness cover switching summary

Existing Product	Name: Provider: Version Date: Product Reference: KFD Reference:	Protection Account - Personal Friends Life 03/2011 no print ref - sample pol docs only PRNFLEC10/02/11 (2002)
Recommended Product	Name: Provider: Version Date: Product Reference: KFD Reference:	Life Insurance - Upgraded Aviva Life & Pensions UK Limited 1/2023 AL50002 1/2023 AL50001 06/2022
Product Type	Level Term Assurance and LTA with CIC	
Superior cover for scored condition - existing product	Total & Permanent Disability - Own Total & Permanent Disability - ADL Loss of independence Loss of speech	
Superior cover for scored condition - recommended product	Cancer (advanced) Children's Critical Illness Multiple Sclerosis Stroke Heart Attack Benign Brain Tumour Parkinson's Disease and similar conditions Ductal Carcinoma In Situ (DCIS)	

The report will show the superior cover of the existing policy, the superior cover of the proposed product and list any covered condition that will be lost by switching policies.

Superior cover for scored condition – existing product	Total & Permanent Disability - Own Total & Permanent Disability - ADL Loss of Independence Loss of speech
Superior cover for scored condition – recommended product	Cancer (advanced) Children's Critical Illness Multiple Sclerosis Stroke Heart Attack Benign Brain Tumour Parkinson's Disease and similar conditions Ductal Carcinoma in Situ (DCIS) Major Organ Transplant Motor Neurone Disease Alzheimer's Disease and Dementia Traumatic Brain Injury Diabetes Cardiomyopathy Blindness Angioplasty Cardiac Arrest Terminal Illness Dementia Third Degree Burns

Research report prepared by Ben Rowell using Defaqto Engage
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defaqto★

Conditions indicated as not included by recommended product which had a level of cover with existing	Total & Permanent Disability - ADW Low Grade Prostate Cancer Total & Permanent Disability - ADL Loss of Independence Loss of speech HIV Infection
-------------------------------------------------------------------------------------------------------------	------------------------------------------------------------------------------------------------------------------------------------------------------------------

The scored conditions will then show for the superior cover of the existing product, along with the accompanying critical illness definitions.

Superior cover for existing product

The comparison below shows where the existing product scored higher than the recommended product for conditions which have been scored based on the CIC Compare scoring methodology.

Condition score comparison

	Protection Account - Personal Friends Life <u>Existing Product</u>	Life Insurance - Upgraded Aviva Life & Pensions UK Limited
Total & Permanent Disability - Own	76	54
Total & Permanent Disability - ADL	72	Not covered
Loss of Independence	70	Not covered
Loss of speech	64	Not covered

○ Higher Score
 ○ Equal Score
 ○ Lower Score

The scores detailed above are relative to each individual condition and not any of the other conditions listed

And the superior conditions and critical illness definitions of the recommended product.

Superior cover for recommended product

The comparison below shows where the recommended product scored higher than the existing product for conditions which have been scored based on the CIC Compare scoring methodology.

Condition score comparison

	Protection Account - Personal Friends Life <u>Existing Product</u>	Life Insurance - Upgraded Aviva Life & Pensions UK Limited
Cancer (advanced)	58	63
Children's Critical Illness	53	81
Multiple Sclerosis	54	87
Stroke	54	87
Heart Attack	50	82
Benign Brain Tumour	65	76
Parkinson's Disease and similar conditions	48	87
Ductal Carcinoma In Situ (DCIS)	51	82
Major Organ Transplant	74	87

Along with any lost cover with the recommended product.

Lost cover with recommended product

The comparison below shows where the recommended product does not include cover for a condition which is covered in the existing product based on the CIC Compare scoring methodology.

Condition score comparison

	Protection Account - Personal Friends Life <u>Existing Product</u>	Life Insurance - Upgraded Aviva Life & Pensions UK Limited
HIV infection	Included	Not included
Loss of independence	70	Not covered
Loss of speech	84	Not covered
Total & Permanent Disability - ADL	72	Not covered

The report then goes on to show the individual weighted/unweighted conditions scores and the total weighted score for your client's specified gender.

Weighted and unweighted condition scores

The table below shows the individual score for each condition plus a weighted score and total weighted score based on the claims percentage of the selected gender Female based on the CIC Compare scoring methodology.

Condition score comparison

	Female Claims %	Protection Account - Personal Friends Life <small>Not Included</small>		Life Insurance + Upgraded Aviva Life & Pensions UK Limited	
		Unweighted Score	Weighted Score	Unweighted Score	Weighted Score
Cancer (advanced)	73.0	58	42	63	46
Children's Critical Illness	41	53	2	61	3
Multiple Sclerosis	5.0	54	3	67	4
Stroke	4.8	54	3	67	4
Heart Attack	2.9	60	2	62	2
Benign Brain Tumour	2.0	65	1	76	2
Parkinson's Disease and similar conditions	0.9	48	43	67	79
Ductal Carcinoma In Situ (DCIS)	0.8	51	46	62	74
Kidney Failure	0.2	70	74	76	74

The final section of the report shows over 100 unscored conditions and whether they are included or excluded.

Unscored conditions

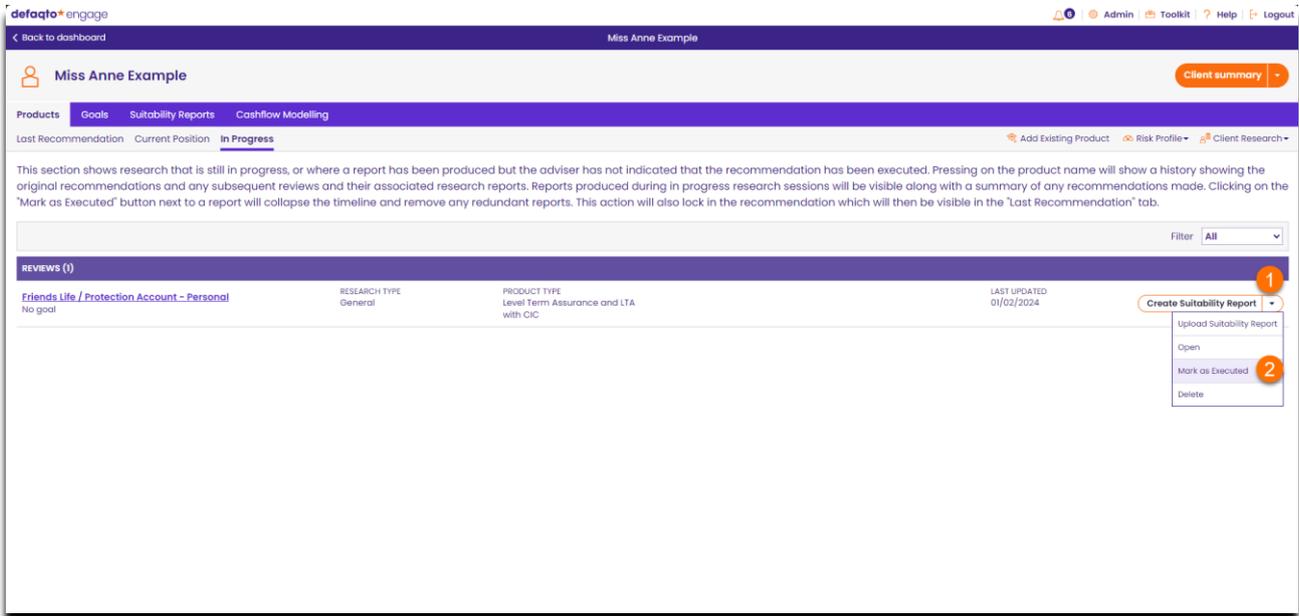
The comparison below shows whether the existing and/or recommended products include cover for a condition which is not scored.

Condition score comparison

	Protection Account - Personal Friends Life <small>Not Included</small>	Life Insurance + Upgraded Aviva Life & Pensions UK Limited
Aortic Aneurysm	Not included	Included
Aplastic Anaemia	Included	Included
Balloon Valvuloplasty	Not included	Not included
Bipolar Affective Disorder	Not included	Included
Bladder Removal	Not included	Not included
Brain Abscess	Not included	Included
Brain Injury Hypoxia	Not included	Included
Carotid Artery Stenosis	Not included	Included
Cauda Equina Syndrome	Not included	Included
Cerebral Aneurysm	Not included	Included
Cerebral Arteriovenous Malformation	Not included	Included
Chronic Hepatitis B or C	Not included	Not included
CIS Anus	Not included	Included
CIS Bile Ducts	Not included	Included
CIS Bladder	Not included	Included
CIS Cervix Uteri	Not included	Included
CIS Colon	Not included	Included
CIS Gallbladder	Not included	Included
CIS Kidney	Not included	Included
CIS Larynx	Not included	Included
CIS Lung	Not included	Included
CIS Oesophagus	Not included	Included

Executing your research

If licensed, you can now create a suitability report for your recommended product. Please read the Suitability Report user guide for information on how to use the functionality.



If you have met with your client and they have confirmed that they wish to proceed with your recommendation, click **Mark as Executed**. It is important to understand that once a research case has been executed it cannot be undone. Please take care to ensure you only execute, once your client has confirmed they wish to proceed with the recommendation.

Once executed, the recommended product will sit under the client record under **Current Position**. If you are using the Intelligent Office integration, the research and suitability (if applicable) reports will be sent back to the client record and a draft plan will have been created.

Further help and support

If you have any further questions regarding CIC Compare, please contact Defaqto Customer Support on 01844 295544 or email customersupport@defaqto.com.

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