



**Presentation**

# Robert Sheptun



**CDM:**

Software Engineer / Manager

**VFPS:**

Financial Adviser

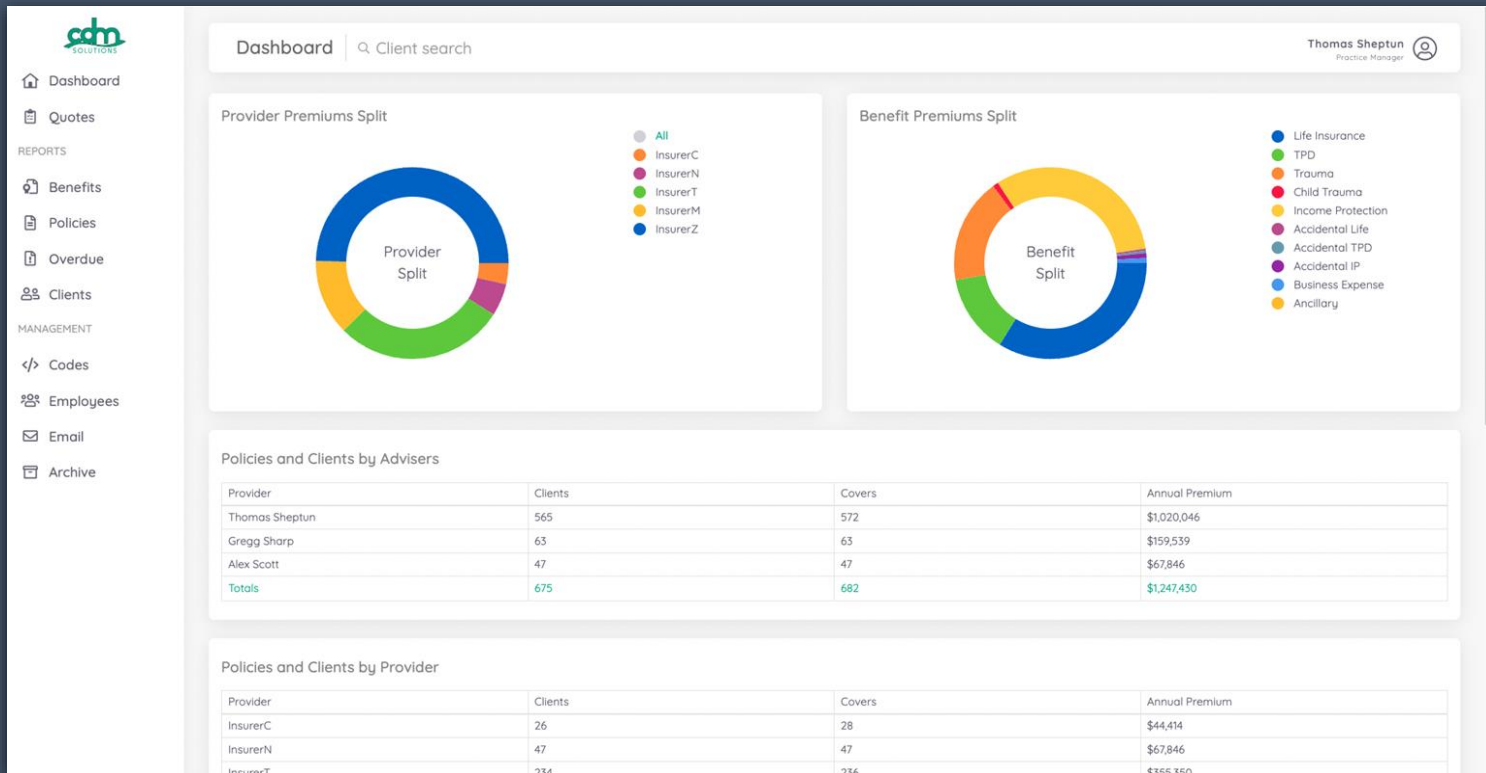
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What is CDM Solutions?

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# Summary of your business



- Provider premiums split
- Benefit premiums split
- Policies and clients by adviser/provider
- Annual premiums
- Sums insured

# Benefits

- Policy ownership
- Filter by number, provider, benefits, adviser code.

**Benefits Report** | Client search

Thomas Sheptun Practice Manager

Show 15 | Provider | Benefit | Adviser | Code | Search | Select Document | Generate

ADVISER	PROVIDER	POLICY	CLIENT (Click name)	DOB	BENEFIT (Hover)	OWNERSHIP (Hover)	SUM INSURED	INFO	CPI	EXCL	LOAD	PAY METHOD	PREMIUM	FREQ	STP/LVL	START	UPDATED
Thomas Sheptun	InsurerC	5112173045	Luke Crawford	28/12/1982 (40)	Income Protection	Ordinary	\$18,465	Indemnity 30 Days To Age 65 Ctm Exc: Yes	Yes	Yes		Manual Payment	\$5,941.04	Annual	Stepped	30/06/2014	13/06/2023
Gregg Sharp	InsurerC	5140536046	Samuel Grieve	31/01/1968 (55)	Accidental IP	Ordinary	\$5,659	Indemnity 30 Days To Age 70 Ctm Exc: Yes	Yes	No		Credit Card	\$406.00	Annual	Stepped	15/12/2016	09/06/2023
Thomas Sheptun	InsurerC	5168899047	Henry Macdonald	08/02/1987 (36)	Accidental IP	Ordinary	\$5,583	Indemnity 30 Days To Age 70 Ctm Exc: Yes	Yes	No		Credit Card	\$146.94	Annual	Stepped	31/01/2017	13/06/2023
Thomas Sheptun	InsurerC	5197262048	Flynn Glasheen	08/02/1987 (36)	Accidental IP	Ordinary	\$2,433	Indemnity 30 Days To Age 70 Ctm Exc: Yes	Yes	No		Credit Card	\$78.98	Annual	Stepped	31/01/2017	13/06/2023
Thomas Sheptun	InsurerC	5225625049	Nate Dunkley	08/02/1987 (36)	Accidental IP	Ordinary	\$202	Indemnity 30 Days To Age 70 Ctm Exc: Yes	Yes	No		Credit Card	\$2.17	Annual	Stepped	31/01/2017	13/06/2023
Thomas Sheptun	InsurerC	5255988050	Bragden Young	08/02/1987 (36)	Accidental TPD	Ordinary	\$70,318	Own	Yes	No		Credit Card	\$132.17	Annual	Stepped	31/01/2017	13/06/2023
Thomas Sheptun	InsurerC	528251051	Austin Deasey (Child)	09/04/2010 (13)	Child Trauma	Ordinary	\$57,881		Yes	No		Direct Debit	\$80.74	Annual	Stepped	20/11/2018	13/06/2023
Thomas Sheptun	InsurerC	5310714052	Sebastian Lahey (Child)	01/05/2012 (11)	Child Trauma	Ordinary	\$57,881		Yes	No		Direct Debit	\$80.74	Annual	Stepped	20/11/2018	13/06/2023
Thomas Sheptun	InsurerC	5339077053	Alicia Cooch (Child)	04/11/2014 (8)	Child Trauma	Ordinary	\$57,881		Yes	No		Direct Debit	\$80.74	Annual	Stepped	20/11/2018	13/06/2023
Thomas Sheptun	InsurerC	5367440054	Luke Crawford	28/12/1982 (40)	Life Insurance	Super	\$421,451		Yes	No		Direct Debit	\$418.37	Monthly	Stepped	09/06/2020	13/06/2023
Thomas Sheptun	InsurerC	5367440054	Luke Crawford	28/12/1982 (40)	TPD	Super	\$421,451	Any	Yes	Yes		Direct Debit	\$867.81	Monthly	Stepped	09/06/2020	13/06/2023
Thomas Sheptun	InsurerC	5424166056	Lilian Waterhouse	31/01/1968 (55)	Accidental Life	Super	\$1,276,281		Yes	No		Rollover	\$1350.68	Annual	Stepped	15/12/2016	13/06/2023
Thomas Sheptun	InsurerC	5452529057	Dakota Soverly	31/01/1968 (55)	Accidental IP	Super	\$5,659	Indemnity 30 Days To Age 70 Ctm Exc: Yes	Yes	No		Rollover	\$2,204.00	Annual	Stepped	15/12/2016	13/06/2023
Thomas Sheptun	InsurerC	5480892058	Zachary Esmond	31/01/1968 (55)	Accidental TPD	Super	\$408,410	Any	Yes	No		Rollover	\$981.19	Annual	Stepped	15/12/2016	13/06/2023
Thomas Sheptun	InsurerC	5509255059	Henry Brophy	25/01/1985 (40)	Accidental TPD	Super	\$1,477,453	Any	Yes	No		Rollover	\$833.20	Annual	Stepped	13/05/2014	13/06/2023


Total: 682

1 2 3 4 5 6 ... 46

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# Look up a specific client

Benefit by Client | 🔍 Luke Crawford

Thomas Sheptun Practice Manager 

Luke Crawford 28/12/1982 Male elijahaarons@dayrep.com

Provider  Code  Select Document  [Generate](#) [Summary](#) [Quoting](#)

ADVISER	PROVIDER	POLICY	CLIENT (Click name)	DOB	BENEFIT (Hover)	OWNERSHIP (Hover)	SUM INSURED	INFO	CPI	EXCL	LOAD	PAY METHOD	PREMIUM	FREQ	STP/LVL	START	UPDATED	
 Thomas Sheptun	InsurerC	<a href="#">5367440054</a>	<a href="#">Luke Crawford</a>	28/12/1982 (40)	<a href="#">Life Insurance</a>	<a href="#">Super</a>	\$421,451		Yes	No		Direct Debit	\$418.37	Monthly	Stepped	09/06/2020	23/06/2023	
 Thomas Sheptun	InsurerC	<a href="#">5367440054</a>	<a href="#">Luke Crawford</a>	28/12/1982 (40)	<a href="#">TPD</a>	<a href="#">Super</a>	\$421,451	Any	Yes	Yes		Direct Debit	\$867.81	Monthly	Stepped	09/06/2020	23/06/2023	
 Thomas Sheptun	InsurerC	<a href="#">5112173045</a>	<a href="#">Luke Crawford</a>	28/12/1982 (40)	<a href="#">Income Protection</a>	<a href="#">Ordinary</a>	\$18,465	Indemnity 30 Days To Age 65 Clm Exc: Yes	Yes	Yes		Manual Payment	\$5,941.04	Annual	Stepped	30/06/2014	23/06/2023	
 Thomas Sheptun	InsurerT	<a href="#">12252115</a>	<a href="#">Luke Crawford</a>	28/12/1982 (40)	<a href="#">Life Insurance</a>	<a href="#">Super</a>	\$534,325		No	Yes		Billing Notice	\$3,053.43	Quarterly	Stepped	11/04/2001	23/06/2023	
 Thomas Sheptun	InsurerT	<a href="#">12252119</a>	<a href="#">Luke Crawford</a>	28/12/1982 (40)	<a href="#">Trauma</a>	<a href="#">Ordinary</a>	\$200,000		Yes	No	150.00%	Direct Debit	\$200.00	Monthly	Stepped	15/08/2000	23/06/2023	

- Client's policies across different providers
- Summary of total insurance position

# Integrated quoting tool

The screenshot displays a web-based quoting tool for a user named Luke Crawford. The user's profile includes Age 40, Male, Non Smoker, Income \$0, Accountant (qualified), Employee, NSW, Exclude Health Discount, Occupation Ratings, Loadings, Quote APL, Scoring, and Required Features. The interface is divided into several sections:

- Quote Options:** Includes dropdowns for Options Mode (Flexible), Multi-Select (No), and AutoRefresh Quote (Yes).
- Projection Options:** Includes checkboxes for Life, TPD Extension, and Trauma Extension, each with associated dropdowns for Sum Insured, Structure, Premium Waiver, Ownership, Life Buy Back, Double TPD, Occupation type, and Pay by Rollover.
- Table of Suppliers:** A table with columns for Logo, Supplier Name, Premium, Insurer, Feature Score, Combined Score, and A. The table lists five suppliers: Zurich, NEOS, MetLife, integrity., and PPS Mutual, each with a corresponding premium amount and score.
- Navigation and Controls:** Includes a top navigation bar with NEW, OPEN, SAVE, DOCUMENTS, RESEARCH, LIVE DATA, and HELP. Below the user profile, there are tabs for View Features, Report, Display Options, and Graph. On the right side of the table, there are dropdowns for Split Frequency and Yearly Premium.

Logo	Supplier Name	Premium	Insurer	Feature Score	Combined Score	A
	Zurich (Life: Protection Plus (Zurich Trustee) - TPD - Trauma ...)	\$4,872.31		91	94	Actions
	NEOS (Life: Life Cover (Super) - TPD - Linked Critical Illness...)	\$4,953.33		83	88	Actions
	MetLife (Life: Life Cover (Super) - TPD - Superlinked Trauma...)	\$5,378.97		98	91	Actions
	integrity. (Life: Life Cover (Super) and Care Support Package...)	\$5,580.98		82	82	Actions
	PPS Mutual (Life: Life Cover (Super) - TPD - Superlink Trau...)	\$5,718.14		99	92	Actions
	Encompass (Life: Life Cover (Super) - TPD - Linked Critical Il...)	\$6,843.01		81	74	Actions

- Adjust your quote as you need
- One-click existing policy comparison
- Complete research tool



# Policy summary

20230613Crawford\_Luke081639PolicySchedule.pdf 1 / 4 100%

**INSURANCE SCHEDULE**

Client: Luke Crawford  
Date of Birth: 28/12/1982  
Smoker: Non Smoker  
Date: 13/06/2023

POLICY NO.	INSURED	DOB	OWNER	TYPE OF COVER	SUM INSURED	PREMIUM	COMMENTS
InsureC 5367440054 Start: 09/06/2020	Luke Crawford	28/12/1982	Luke Crawford Superfund (Super)	Life Insurance	\$421,451	\$418.37 Monthly	Indexation: Yes Exclusion: No Direct Debit Stepped
InsureC 5367440054 Start: 09/06/2020	Luke Crawford	28/12/1982	Luke Crawford Superfund (Super)	TPD	\$421,451	\$867.81 Monthly	Any Indexation: Yes Exclusion: Yes Direct Debit Stepped
InsureC 5112173045 Start: 30/06/2014	Luke Crawford	28/12/1982	Luke Crawford (Ordinary)	Income Protection	\$18,465	\$5,941.04 Annual	Indemnity 30 Days To Age 65 Cm Ex: Yes Indexation: Yes Exclusion: Yes Manual Payment Stepped
InsureT 12252115 Start: 11/04/2001	Luke Crawford	28/12/1982	Luke Crawford Superfund (Super)	Life Insurance	\$534,325	\$3,053.43 Quarterly	Indexation: No Exclusion: Yes Billing Notice Stepped

InsureT 12252119	Luke Crawford	28/12/1982	Luke Crawford (Ordinary)	Trauma	\$200,000	\$200.00 Monthly	Indexation: Yes Exclusion: No Loading: 150.00%
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- Choose one of many formats (PDF; DOCX)
- Instant access to client's policy summary
- Customise by adding your logo/colors
- Reach out and make it your way

# Settings

Benefit by Client | Client search

Thomas Sheptun Practice Manager

Provider Code Schedule PDF Generate Summary Quoting

ADVISER	PROVIDER	POLICY	CLIENT (Click name)	DOB	BENEFIT (Hover)	OWNERSHIP (Hover)	SUM INSURED	INFO	CPI	EXCL	LOAD	PAY METHOD	PREMIUM	FREQ	STP/LVL	START	UPDATED
Thomas Sheptun	InsurerC	5367440054	Luke Crawford	28/12/1982 (40)	Life Insurance	Super	\$421,451		Yes	No		Direct Debit	\$418.37	Monthly	Stepped	09/06/2020	15/06/2023
Thomas Sheptun	InsurerC	5367440054	Luke Crawford	28/12/1982 (40)	Life Insurance	Super	\$421,451		Yes	No		Direct Debit	\$867.81	Monthly	Stepped	09/06/2020	15/06/2023
Thomas Sheptun	InsurerC	5367440054	Luke Crawford	28/12/1982 (40)	Life Insurance	Super	\$421,451		Yes	No		Direct Debit	\$5,941.04	Annual	Stepped	30/06/2014	13/06/2023
Thomas Sheptun	InsurerT	1234567890	Thomas Sheptun	01/01/1990	Life Insurance	Super	\$1,053.43		Yes	No		Direct Debit	\$1,053.43	Quarterly	Stepped	11/04/2001	13/06/2023
Thomas Sheptun	InsurerT	1234567890	Thomas Sheptun	01/01/1990	Life Insurance	Super	\$200.00		Yes	No		Direct Debit	\$200.00	Monthly	Stepped	15/08/2000	13/06/2023

Account

Email: thomas@cdmsolutions.com.au

Name: Thomas

Phone: 0416 700 234

Surname: Sheptun

DOB: 01/01/1990

Email to send invoice: thomas@cdmsolutions.com.au

Company identification number (ID): TESTPtyLtdTeam3233644302

Upload your logo. Upload your logo for use in files and on the application page (Desired format 3/2)

Save Changes

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- Upload your logo
- Customise existing summary policy template
- Customise Omnium pre-population
- Customise excel exports
- Security settings

# State report

State	Clients	Covers	Life Insurance	TPD	Trauma	Child Trauma	Income Protection	Accidental Life	Accidental TPD	Accidental IP	Business Expense	Premium
ACT	4	4	\$2,788,911	\$0	\$0	\$100,000	\$10,564	\$0	\$0	\$0	\$0	\$11,611.37
NSW	186	177	\$65,120,035	\$26,786,742	\$5,274,497	\$2,367,299	\$248,386	\$0	\$1,477,453	\$9,229	\$0	\$267,699.45
VIC	512	394	\$105,302,396	\$59,475,052	\$18,000,560	\$3,162,591	\$436,361	\$6,432,914	\$2,511,408	\$40,019	\$29,994	\$774,729.99
QLD	0	0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0.00
TAS	2	2	\$1,340,096	\$0	\$0	\$100,000	\$0	\$0	\$0	\$0	\$0	\$1,138.03
WA	117	92	\$35,395,737	\$13,605,360	\$3,406,055	\$448,510	\$92,266	\$100,000	\$0	\$0	\$0	\$172,534.35
SA	0	0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0.00
NT	0	0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0.00
Unknown	12	13	\$7,969,057	\$3,790,261	\$0	\$200,000	\$19,952	\$0	\$0	\$0	\$0	\$19,717.30



# Policies

Policies

Thomas Sheptun Practice Manager

Show 10 Provider Month Adviser Code Search Select Document Generate

ADVISER	FULL NAME	EMAIL	PROVIDER	POLICY	COMMENCED	OWNERSHIP	DAYS UNTIL ANNIV	PREMIUM (ANNUAL)	PREMIUM	PAY METHOD	FREQUENCY
Thomas Sheptun	Savannah O'Meara		InsurerT	12252333	26/06/2017	Super	3	\$1,778.48	\$1,778.48	Billing Notice	Annual
Thomas Sheptun	Sophia Brown		InsurerT	12252335	26/06/2017	Super	3	\$3,779.16	\$3,779.16	Billing Notice	Annual
Thomas Sheptun	Dylan Sergejev		InsurerT	12252337	26/06/2017	Ordinary	3	\$2,030.28	\$169.19	Credit Card	Monthly

- Summarises policies
- Number of days until policy renewal
- Group by month, provider, etc.

**DAYS UNTIL ANNIV**

3
3
3
3
3

Show 10 Provider Month Adviser Code Search

**PAY METHOD**

Billing Notice
Billing Notice
Credit Card

# Overdue

OUTSTANDING	LAPSE DATE	PAY METHOD	EMAIL
\$3,791.74	20/10/2022	Billing Notice	All emails sent
\$2,723.20	01/09/2022	Direct Debit	All emails sent
\$3,945.88	31/08/2022	ROLLOVER	All emails sent
\$2,030.88	31/08/2022	ROLLOVER	All emails sent
\$447.37	10/09/2022	ROLLOVER	All emails sent
\$44.29	17/09/2022	ROLLOVER	All emails sent
\$9.93	17/09/2022	ROLLOVER	All emails sent
\$7.54	17/09/2022	ROLLOVER	All emails sent
\$17.93	19/09/2022	ROLLOVER	All emails sent

- See clients who didn't pay in time
- Used to send automatic emails

# Automatic emails

### Personal data email

Email level:  Host:

SMTP Email:  SMTP Password:

SMTP BCC:  Reply To:

SMTP From Name:

### Advisers data email

Alex Scott	
Gregg Sharp	
Thomas Sheptun	

### Document Settings

Available files

HappyBirthday/TESTPtyLtdTeam323364430				
InsuranceRenewal/TESTPtyLtdTeam3233644				
OverdueEm/TESTPtyLtdTeam32336443020\				
OverdueEm2/TESTPtyLtdTeam3233644302C				

Every Week?

Second Email?

Only Non-Super policies

Every Week?

Email subject

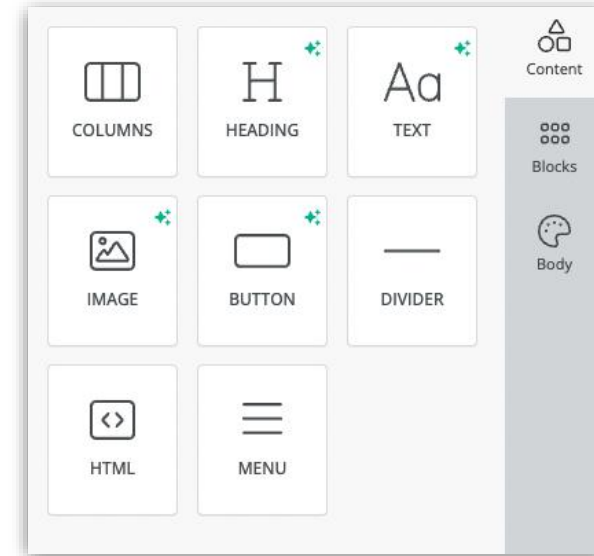
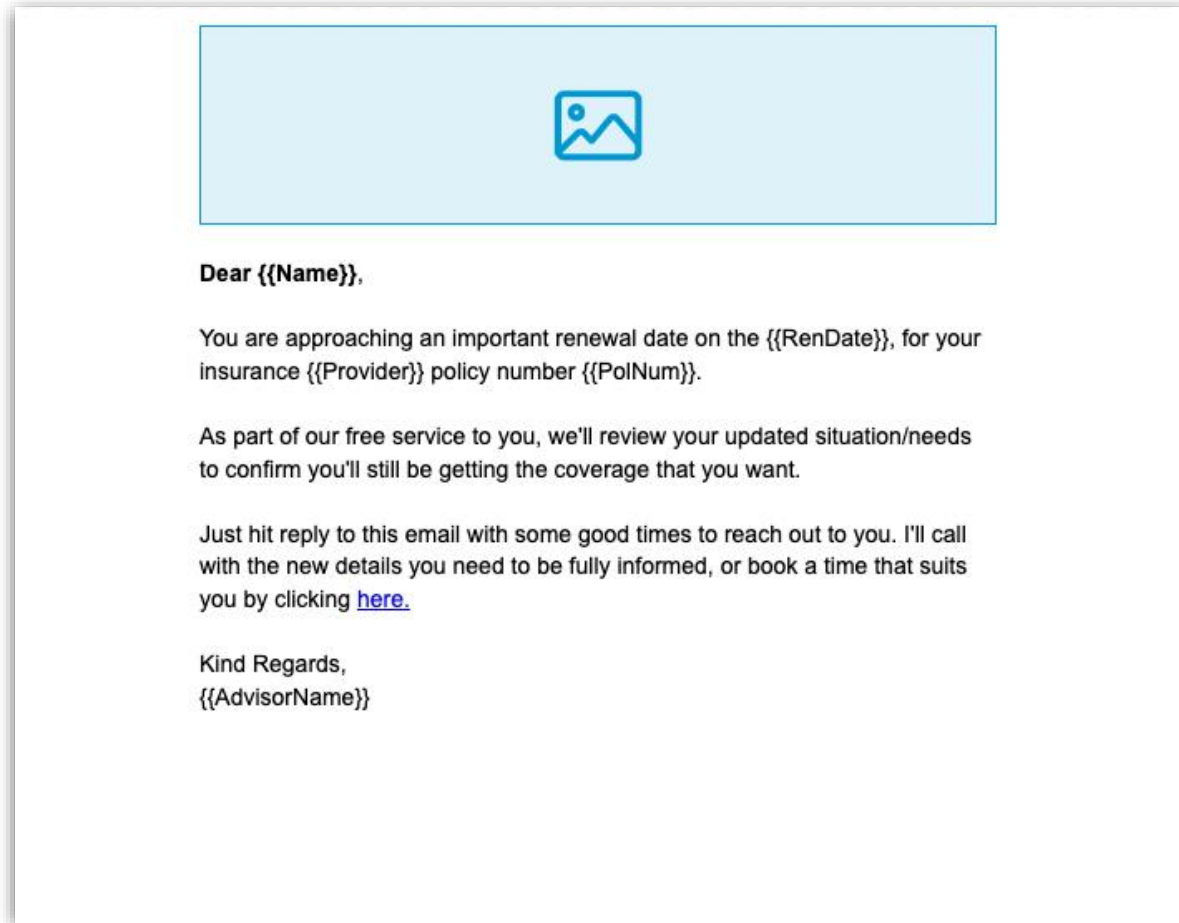
Days before renewal

Attach Policy Schedule?

Password protect?

- Remind clients to renew a policy
- Notify if a policy is overdue
- Birthday greeting emails

# Emails customisation



Add text, images and more




# Archive

Archive | Client search Thomas Sheptun  
Practice Manager 

Search

DATE	CLIENTS	POLICY	ACTIVE BENEFITS	INACTIVE BENEFITS	OVERDUES	ACTION
28/05/2023	698	681	682	23	10	<a href="#">View or print →</a>
14/06/2023	833	681	682	23	9	<a href="#">View or print →</a>

Snapshots | Client search Thomas Sheptun  
Practice Manager 

As of 14/06/2023 [Download all](#)

Clients

Show 15 | State | Age Group | Search | Select Document | [Generate](#)

ADVISER	NAME	DOB	GENDER	EMAIL	PHONE	SMOKER	OCCUPATION	STATE	REFERRAL	TOTAL PREMIUM
Thomas Sheptun	Luke Crawford	28/12/1982	Male	elijahaarons@dayrep.com		Non Smoker	Accountant (qualified)	NSW		\$35,988.92
Gregg Sharp	Samuel Grieve	31/01/1968	Male	tristanbirdseye@superrito.com		Non Smoker	Doctor	VIC	John	\$406.00
Thomas Sheptun	Henry Macdonald	08/02/1987	Male	brodiebessell-browne@gustr.com		Non Smoker		VIC		\$146.94
Thomas Sheptun	Flynn Glasheen	08/02/1987	Male	harrisonordell@fleckens.hu		Non Smoker		VIC		\$78.98
Thomas Sheptun	Nate Dunkley	08/02/1987	Male	benjaminmenkens@cuvax.de		Non Smoker		VIC		\$2.17
Thomas Sheptun	Brayden Young	08/02/1987	Male	makajlapeterson@superrito.com		Non Smoker		VIC		\$137.17
Thomas Sheptun	Lilian Waterhouse	31/01/1968	Male	joshuamackaness@jourrapide.com		Non Smoker		VIC		\$1330.68
Thomas Sheptun	Dakota Saverij	31/01/1968	Male	lukecrowford@armyspy.com		Non Smoker		VIC		\$2,204.00
Thomas Sheptun	Zachary Esmond	31/01/1968	Male	beaupollard@cuvax.de		Non Smoker		VIC		\$981.19
Thomas Sheptun	Henry Brophy	25/01/1983	Male	evieatkinson@armyspy.com		Non Smoker		NSW		\$833.20
Thomas Sheptun	Hudson Jeffries	25/01/1983	Male	masonherrad@armyspy.com		Non Smoker		NSW		\$1,504.73
Thomas Sheptun	Matthew Pennington	25/01/1983	Male	gabrielleshirlow@cuvax.de		Non Smoker		NSW		\$3,566.11
Thomas Sheptun	Archer Prinsep	08/02/1987	Male	chelseagraebner@dayrep.com		Non Smoker		VIC		\$386.43
Thomas Sheptun	Will Honey	08/02/1987	Male	patrickcolls@fleckens.hu		Non Smoker		VIC		\$274.34
Thomas Sheptun	Alicia Carslow	25/06/1958	Male	calebkibby@gustr.com		Non Smoker		VIC		\$157.19

- Archived twice a month
- Ability to view past data
- Export in different formats

# Users management

Email

Password

Name

Surname

DOB

Phone

Role

1. **Channel Adviser** has access to all company data and exports, the ability to add and edit their codes and imports.

2. **Adviser** has access to their own data and exports, the ability to add and edit their codes and imports.

3. **Support** has access to selected advisers data and does not have the ability to export data in bulk, does not have access to codes and imports.

**Add**

Role

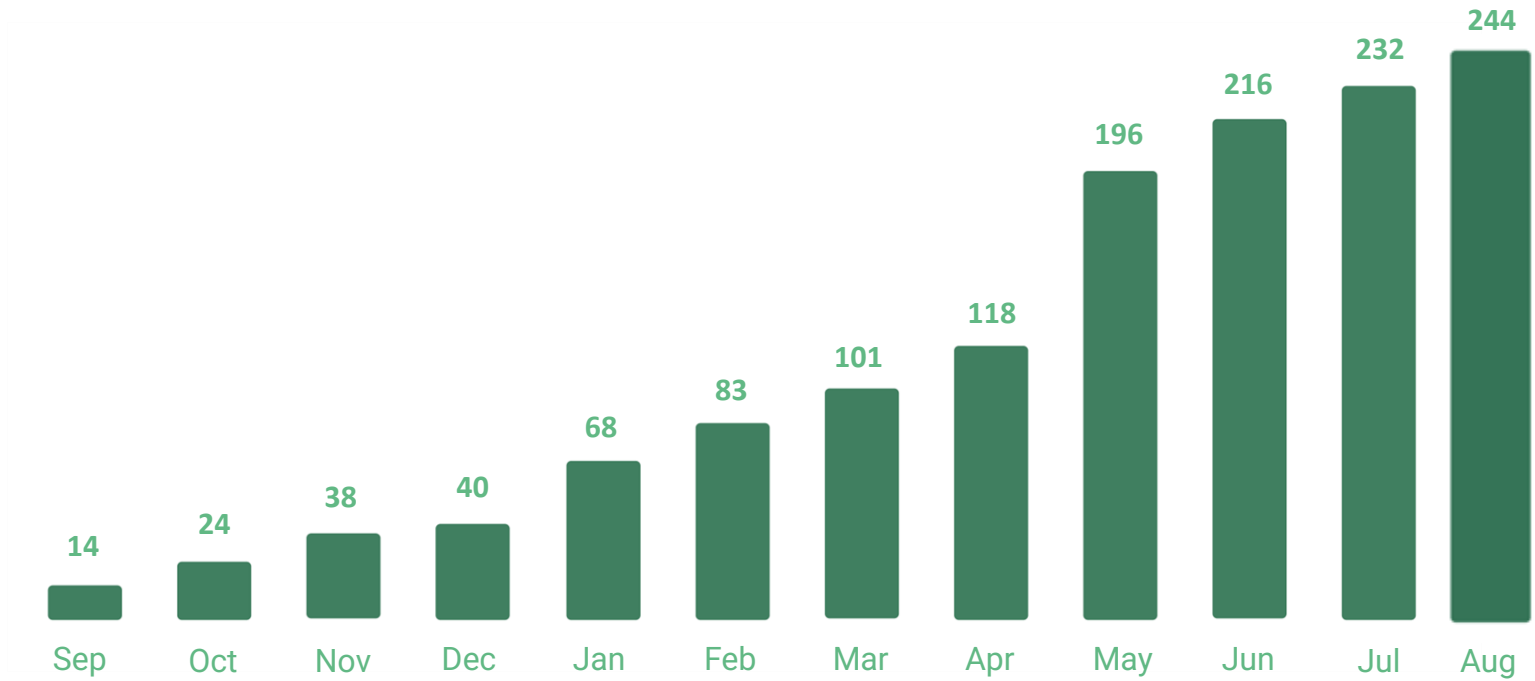
- ✓ Channel Adviser
- Adviser
- Support

Role

Has access to?

Thomas Sheptun	<input type="checkbox"/>
Gregg Sharp	<input type="checkbox"/>
Alex Scott	<input type="checkbox"/>

## Number of Practices



**474**

clients per practice on average

**115,656**

clients overall

**\$401 000 002**

premiums under management

Thank you. Questions?