

Affiliate Membership Subscription

Pricing Information

We have upgraded the service with some new functionality and have introduced new pricing in 2014. The changes are in response to feedback from our members to provide greater flexibility particularly for firms where they have a number of advisers who have varying levels of usage amongst them but would like to have access across all of the advisers.

To facilitate this we have introduced **credit based subscriptions**. That means that if, for example, a firm of two advisers want access to the service they can do this by sharing a credits package subscription.

For **single adviser firms**, the introduction of these credits should make little difference since we have set the maximum credit limit at a level above that used by the majority of our members.

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- **Subscribing to the CIExpert Affiliate Membership Service**
- **Pricing Information**

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- **Credits**

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- **How credits work:**

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- A single credit is used for each new set of client details that you enter into the system. Once this is in place you can carry out as much research as you like; varying different parameters such as child cover, sum assured, smoker status etc. You will be able to see how far you are from reaching the credit limit on your home page, as well as on starting a new assessment, so it's easy to keep track of them.

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- If you make a **single payment subscription** for say 3 or 12 months then all the credits will be available to use immediately. If you are a very high user and reach the maximum credit limit quickly, then you can purchase a credit top-up. Subscriptions are duration based so when the subscription period expires any unused credits also expire and when you renew you start with new credits.

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- If you make a **monthly payment subscription** for 12 months then the credits are allocated each month. However, if you have a short period of high usage your credit balance will allow you go into the negative, providing you the freedom to use the following months credits.

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- **Training Credits**

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- We understand that new members will require some time to get used to the system. Therefore, new members will be granted some training credits to start their subscription. These credits can be used to gain familiarity with the system and try out some examples.

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- When you choose to make use of a training credit, the system automatically changes the client name to 'Training' and the reports generated will have a demonstration watermark on them.

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- We have introduced some new functionality so we will be making some of these training credits available to help members familiarise themselves with the new functionality.

Choose a plan that works for you

Pricing Options

Single Adviser Firms

For single adviser firms the introduction of these credits should make little difference since we have set the maximum credit limit at a level above that used by the majority of our members.

Single adviser one-off payment subscription options:

| Duration | Max. Credits | Plan Price | Price incl. VAT |
|-----------|--------------|------------|-----------------|
| 3 months | 20 | £110 | £132 |
| 12 months | 80 | £360 | £432 |

Single Adviser monthly payment subscription*:

| Duration | Max. Credits | Monthly Payment | Total Price |
|-----------|--------------|---------------------------|-----------------------------|
| 12 months | 80 | £33 (£39.60 incl. VAT) | £396 (£475.20 incl. VAT) |

Note: To be paid by Direct Debit. 3 month cancellation fee if cancelled within first 12 months.

Firms with a Paraplanner

Where a paraplanner is supporting a number of advisers then some members prefer to operate a single account.

To support this we have introduced **Premium** and **Premium Plus** accounts that provide a higher maximum credit limit to reflect the higher usage levels required.

Single Adviser/Paraplanner one-off payment subscription options:

| Plan | Duration | Max. Credits | Plan Price | Price incl. VAT |
|--------------|-----------|--------------|------------|-----------------|
| Premium | 12 months | 120 | £530 | £636 |
| Premium Plus | 12 months | 180 | £775 | £930 |

Single Adviser/Paraplanner monthly payment subscription*:

| Plan | Duration | Max. Credits | Monthly Payment | Total Price |
|--------------|-----------|--------------|---------------------------|-----------------------------|
| Premium | 12 months | 120 | £48 (£57.60 incl. VAT) | £576 (£691.20 incl. VAT) |
| Premium Plus | 12 months | 180 | £70 (£84.00 incl. VAT) | £840 (£1008 incl. VAT) |

Note: To be paid by Direct Debit. 3 month cancellation fee if cancelled within first 12 months.

Firms with Several Advisers

Where a firm has **several advisers** the amount of protection business that they do may vary significantly depending upon their individual skills and preferences.

We have introduced packages that allow access for a number of advisers at a lower cost. All the advisers share the same credits available in the package and so those with lower usage levels can still make use of the system in an economical way.

Please see the following table for details.

* for monthly subscriptions, credits are released on a monthly basis, allocating a twelfth of the total each month.

Choose a plan that works for you

Pricing Options Summary

| Account Type | Duration (Months) | No. of Advisers | Max. Credits | Single Payment | | Monthly Payment | | | |
|---------------|-------------------|-----------------|--------------|----------------|-------------------------|-----------------|--------------------------|------------|---------------------|
| | | | | Single Payment | Single Payment incl VAT | Monthly Payment | Monthly Payment incl VAT | Total Cost | Total Cost incl VAT |
| Standard | 3 | 1 | 20* | £110 | £132 | N/A | | | |
| Standard | 12 | 1 | 80* | £360 | £432 | £33.00 | £39.60 | £396.00 | £475.20 |
| Premium | 12 | 1 | 120* | £530 | £636 | £48.00 | £57.60 | £576.00 | £691.20 |
| Premium Plus | 12 | 1 | 180* | £775 | £930 | £70.00 | £84.00 | £840.00 | £1,008.00 |
| Multi-Adviser | 12 | 2 | 150* | £595 | £714 | £55.00 | £66.00 | £660.00 | £792.00 |
| Multi-Adviser | 12 | 2-5 | 200* | £760 | £912 | £70.00 | £84.00 | £840.00 | £1,008.00 |
| Multi-Adviser | 12 | 6-9 | 300* | £1,080 | £1,296 | £100.00 | £120.00 | £1,200.00 | £1,440.00 |

* for monthly subscriptions, credits are released on a monthly basis, allocating a twelfth of the total each month.

When can I start my membership?

How to Pay

Send us an email invoice request or subscribe online to get started today.

Online



Payment can be made online via our website using Credit/Debit cards.

[click here](#)

BACS/Bank Transfer



If you would like to pay by Internet Banking or BACS transfer then we will put together an invoice for you with the appropriate payment information.

Contact us at billing@ciexpert.co.uk

Direct Debit - Monthly Payments



If you would like to pay by monthly subscription then we will provide a link for you to setup a Direct Debit authorisation for the payment plan of your choice via GoCardless.

Once we receive confirmation the DirectDebit has been authorised we will setup the account for you straight away. You will receive an email each month from GoCardless notifying you when the monthly payment is being taken.

Contact us at billing@ciexpert.co.uk