



oportura 



**Exclusive high quality  
annuity sales leads  
with real-time delivery**

information pack

# A warm welcome...

I would like to introduce your company to Oportura; we are a professional, reliable supplier of high quality leads to the financial services industry.

We are one of the UK's largest suppliers of Pension Annuity & Drawdown leads; we currently generate in excess of 100 leads on average every day.

Our aim is to set the standard in lead generation, one that provides quality, one that provides professionalism, and through the use of technology, one that provides easy access to sales leads that can work for your business no matter how large or small.

I would like to invite you to have a look through this information pack to understand how we work, let me show you how Oportura could open up a new sales channel for your business.

I look forward to working with you and building a long term mutually beneficial relationship.

**Nigel Borwell**  
**Sales Director**  
**Oportura**

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## About opertura

Opertura is a part of Lead Technologies, we are a forward thinking, technology driven lead generation company.

We have over 12 years' experience in producing high quality sales opportunities online which makes us the perfect partner for your lead generation requirements.

### **What makes us different from other lead providers?**

- All our leads are generated exclusively for our partners, **and that's 100% guaranteed!**
- The customer is expecting a call from your company
- Our leads are delivered real-time into your inbox or mobile phone.
- We supply leads regionally and nationally.
- We supply you with a FREE secure online lead management and reporting tool.
- Attractive 'In Arrears' Payment Terms
- No Set Up Fee / Monthly Membership Fee

### **What leads do we currently supply?**

We currently supply leads in the following areas to over 100 partners across the UK.

- Financial Advice leads
- Pension Annuity Leads
- Pension Drawdown Leads
- Private Medical Insurance Leads

## Testimonials

*"Levels of new business has increased by 50% within the company since we started working with you, great service"*

**Mr. Brian Mellon, Director at Mellon Money Manager. Glasgow**

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*"The quality of your pension drawdown leads has been excellent, your lead service has proven to be more cost effective than other marketing I have tried in the past"*

**Mr. Ray Fraser, Managing Director at Fraser Financial Services. St Albans.**

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*"Thank you for your professional approach to lead generation, your leads are reliable and cost effective"* **Mr. Dean Mirfin, Group Director at Key Retirement Solutions. Preston.**

Over the last ten years we have signed up with various lead providers, who always promise their leads will lead to greatly increased business for our advisers. Sadly, these have nearly all ended up with me trying to break the contract early and fighting with them over their rejections criteria. In fact we have never renewed a contract".

*"When I received the email from Lead Technologies Ltd I liked the look of the offering but as usual was highly sceptical that they would actually deliver. After an assurance that if things were not as promised after two weeks we could rip the contract up, I signed up fully expecting to have to do this".*

*"Well to my very pleasant surprise I have just renewed the contract for a second period. We have received the emails as promised and they have nearly all been the type of clients we look for with the need for financial advice. Even in the rare case of a problem the rejections policy is fair and transparent and with no quibbling".*

*"I would not hesitate to recommend Lead Technologies to other IFAs and in our case for the first time ever our advisers are actually moaning that they now have too many people to see".*

**Mr. Andy Tuck, Operations Manager, Bankfield Financial Advisors Ltd. Leicester.**

# Our service

## Exclusive Annuity Leads

Unlike some lead generation companies, Oportura will generate leads exclusively for your company or organisation and guarantee 100% that our leads are not sold to more than one company.

## Premium Quality Annuity Leads

We pride ourselves on producing high quality leads, every effort is made to ensure every part of our lead generation and qualification process is as targeted and relevant as possible.

## Real-time Lead Delivery

All our leads are delivered in real time, this means the moment an enquiry is placed you will receive the lead in the form of an email.

The lead will also be placed into an online lead management and reporting system for you to view and interact with.

## Online Lead Management

Once you have been given an account, you will be given online secure access to your own personal lead management and reporting system.

Below are some of the features available within this system.

- Monitor incoming leads in real time
- Assign notes to individual leads (ie call back)
- View all leads and sort by rejected and pending rejection
- Export leads to an excel spreadsheet (.csv) allowing you to import into your sales software
- Reject leads that don't conform to your lead agreement
- View reports on your leads including
  - o Total Leads per day
  - o Age Demographics
  - o Leads by day of the week and time of day
  - o See number of leads by district (city) and region
  - o View the size of the pension funds

## Dedicated Account Manager

We will assign a dedicated account manager to look after your account ensuring everything runs smoothly and your expectations are met right from the start of our relationship.

## Fair Lead Rejection Policy

Oportura are committed to ensuring that all our partners are treated fairly and with a consistent approach. By setting out our Lead Rejection Policy we strive to ensure that you are clear about what we will and won't class as a rejection.

## Reliable Lead Supply

Our daily lead supply is managed by intelligent in-house systems which are designed to deliver your leads as near to your required volumes and as evenly as possible.

## Professional Service

We aim to provide you with a service that is easy to use, meets your expectations and above all is professional. We want to build long-term relationships with you.

# Pension Annuity Leads

Oportura produce sales enquiries (Leads) from consumers age 55 and over who require financial advice and or quotations for Pension Annuity, Income Drawdown & other related financial products.

Oportura is one of the largest suppliers of retirement leads, producing on average 50 Pension Annuity & Income Drawdown leads every day.

We boast one of the largest average fund values of all lead providers in this sector, our average pension fund value is over 75K\*

## How do we generate our leads

All our leads come from people looking for Pension Annuity and related financial services online.

We use very high quality websites to attract consumers arriving from high impact, targeted marketing campaigns, all of which are designed and managed in-house by our very own experienced team.

We only pay for traffic ensuring that we only attract the right kind of audience, which along with methods we adopt on our websites produces us a very good standard in lead quality.

## Lead Pricing

We charge a fixed price per lead, also known as Cost per Lead (CPL) within the industry. Some of our leads are plus VAT and some are exempt, if you're not sure just ask.

We do not charge a set up fee, or any recurring fees, once you have paid for a valid lead supplied by us; the data is yours for future use.

## Annuity Lead Pricing

<b>National Lead Supply</b>	£40.00 (plus vat)
<b>Postcode Specific (subject to availability)</b>	£45.00 (plus vat)

## Example Sample Annuity Lead Data

<b>First Name:</b>	Fred
<b>Last Name:</b>	Blogs
<b>Full Address:</b>	Wharfebank House, Oley Leeds
<b>Postcode:</b>	LS213AJ
<b>Tel Number:</b>	01943462551
<b>Mobile Tel Number:</b>	07930556787
<b>Email Address:</b>	Fred.blogs@hotmail.com
<b>Pension Fund Value (£)</b>	100.000.00
<b>Who is your current provider?</b>	Aviva
<b>Do you have any Medical Conditions?</b>	Yes
<b>Do you Smoke?</b>	Yes/No
<b>Date of Birth</b>	25/05/1951

## Payment Terms

You will be given the following payment terms if you qualify for an account with Oportura, if not you may be asked to pay upfront for your first batch of leads and or the initial trial period.

**14 Days in Arrears - Strictly Payable on Invoice** – You will be invoiced twice a month for leads received within that period, all payments must be made by BACS, instructions will be available on the invoice.

**If payment has not been received within 48 hours of the invoice date, the delivery of your leads will automatically stop.**

## Rejection Criteria

The following information is a breakdown of our lead rejection criteria:

**A lead will be considered for rejection if one or more of the following conditions are present:**

- Invalid numbers, i.e. number not recognised or number does not accept incoming calls. This must apply to all numbers provided on the lead form
- A fraudulent application – Leads with correct contact details but the person confirms that that they did not submit their details, therefore the enquiry is unauthorised
- A hoax application. E.g. name field, Donald Duck
- Duplicate leads - been previously supplied by the Supplier in the last 90 days.
- An application from a minor.
- An application from a non-UK tax payer.
- A lead does not match any 'specific criteria' stated in the Supply of Leads Agreement.

## How to get started

Hopefully we have answered all your questions. If not please call one of our sales advisors on **01943 462551**.

If your company or organisation qualifies for an account we can set everything up in just 24hrs

***We need the following information to set up your account:***

1. A Completed and Signed 'Supply of Leads Agreement'.
2. Your company profile & logo – Once a potential customer has submitted an enquiry through one of our websites they are directed to a page that promotes your company. We will supply you with a well worded company profile as a part of your account set up; alternatively you can supply us with your own profile before your account goes live or at any time in the future.

***Please provide your logo as a JPG or gif file***

***Note: If you supply a customized profile, it should contain a maximum of 200 words***

## Get in Touch

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