

RFC CLIENT ARCHIVE SYSTEM

As a member of the IARFC, we are making available to you a specially developed **Client Archive System**. This system is designed to be given to your clients at the time of engagement and will enable them to maintain a level of organization that is unsurpassed in our industry. You, as the financial professional, will ensure that they are able to accurately maintain their financial records for both their personal finances and their tax-related issues.

In this special member benefit from the IARFC you will receive two cases, one for Documents and a slightly smaller one for yearly Tax Records. You will soon be able to provide your clients an important value-added benefit that will enhance your status as their trusted advisor. We have recommended offering Archive Cases to qualified prospects as part of your initial presentation for a fee-based financial plan.

The RFC **Client Archive System** includes two archival storage cases, hanging file folders, pre-printed section labels, blank labels, customizable client labels, complete instructions for use, a script for the prospect presentation and a CD-ROM with templates for producing additional labels.

Subsequent Sets: When you order from IARFC, we provide you full assembly instructions and how to order the components directly from Staples and Office Max with special discounts negotiated by IARFC.

Complete the form below and send it back to us to purchase your initial RFC **Client Archive System** today. You may purchase as many sets as you wish at this rate. Then you can order the components directly from Staples and Office Max and reduce your costs.



2 Archive Cases - Documents and Tax Records

40 Hanging Folders (25 & 15)

40 Pre-printed Tabs (25 & 15)

14 Blank Tabs and 2 Client Labels

1CD-Rom - Includes full instructions for using the Client Archive System to secure new client engagements.

IARFC Special Price \$175 plus Shipping & Handling \$20

Name: _____ (Please print)

Firm: _____

Visa Master Card

Address: _____

Amex Discover

(Please no P.O. Boxes)

City: _____

Check written to: IARFC

State: _____ Zip: _____ Card No. _____

Phone: _____ Expiration: _____

Fax: _____ E-mail: _____

Website Address (optional): _____

Your Signature: _____ Date: _____

FAX TO: 513 424 5752

MAIL TO: IARFC, Box 42506, Middletown, OH 45042-0506