

**BUILDER Suite Workshop**

**Day One - PracticeBUILDER** A one day program that will involve you in the full utilization of **Practice Builder Financial**. You and your staff will operate a Practice Builder system on your own training computer. As a beginning or experienced user, you'll be challenged to set up marketing campaigns, select and modify sequences, and explore all the capabilities of Practice Builder.

\$295  
Per day  
1<sup>st</sup> Attendee \$ \_\_\_\_\_  
 \$250  
Per day  
Additional Attendee

**Day Two - ClientBUILDER and Practice Strategies** Strategic planning for your practice may be the most important goal for the principal advisor. You will explore how to engage prospects while improving your image and setting the table for a successful, long term relationship. Use **Client Builder** to present effectively and clearly define the scope, and the complexity, of your services. Study ways that financial planning software can be most beneficial. A great addition to either the Practice Builder or Plan Builder sessions.

\$295  
Per day  
1<sup>st</sup> Attendee \$ \_\_\_\_\_  
 \$250  
Per day  
Additional Attendee

**Day Three - PlanBUILDER** As a beginning or experienced user, this one day program provides significant interaction with the class as you learn **Plan Builder**. Bring your laptop, or use one of our dedicated computers for maximum benefit. You will learn how **Plan Builder** supports the financial planning process while exploring the power of this flexible and powerful tool to motivate your clients to take action now!

\$295  
Per day  
1<sup>st</sup> Attendee \$ \_\_\_\_\_  
 \$250  
Per day  
Additional Attendee

**BUILDER Suite Workshop** – Attend a three day workshop for **Practice Builder** and **Client Builder** and **Practice Strategies** then follow up with a day of **Plan Builder**. Learn without day-to-day distractions in our classroom environment.

\$590  
First Attendee \$ \_\_\_\_\_  
 \$450  
Additional Attendee

**Web Training** – Connect through Go To Meeting Center on the Internet (www.gotomeeting.com) for **effective one-on-one training on your computer**.

One Hour \$175  
Two Hour \$300 \$ \_\_\_\_\_

**On Site Training** – As an advanced user, this will allow you to customize the training to better use the system and become more productive. Training tailored to your own specific needs for **Practice Builder** or **Plan Builder** and **for multiple staff associates**. Advantageous training on your system in your office environment no travel time spent or expense. (up to 5 attendees) One, two or three day training available. You and staff learn at your own pace.

One Day \$1,350  
Two Day \$2,150  
Three Day \$2,700 \$ \_\_\_\_\_

The User will be responsible for other expenses including, coach airfare from Dayton or Cincinnati (FPC will fax an estimate of airfare charge to you for approval before booking), lodging for the entire training period (which will include flying in the night prior and, depending on your location, lodging for the last day of training) and any taxi or incidental expenses incurred by the trainer.

Sub Total \$ \_\_\_\_\_  
 \$ \_\_\_\_\_  
**Total** \$ \_\_\_\_\_

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Questions/Comments: \_\_\_\_\_

**Cancellation Policy:**

Builder Suite Workshop - We reserve the right to cancel the workshop with a 30 day notice. We will email you with confirmation of the Builder Suite Workshop and recommend you **do not** book any travel arrangements until you receive confirmation of the session. **Minimum required attendance is six.**

**Fax to: 513 424 5752**