Order Form

CRM – Client Relationship Management is the science, process and procedure for cementing client relationships, securing referrals, converting prospects into clients and enhancing your media presence – by activating targeted, consistent, frequent professional communications, both written and oral. **Practice Builder** is the premier CRM software for financial advisors. The software is adaptable for every advisor's practice. It works well for fee based, commission based or any combination of these. Your license to use **Practice Builder** is scaleable from the single producer practice all the way to the multiple producer, multiple staff, agency office.

This easy to use, fully featured, mature software includes many different applications to quickly pay for itself with significant contributions to productively, efficiency and marketing. A library of letters, agendas, articles, and checklists is included that can be searched and edited for your use. Practice management tools, such as appointment and task scheduling, are included even in the single advisor version.

Toll-free technical support is included until your June renewal next year. The annual support and maintenance fee is among the lowest in the industry while the quality of support is among the highest. Mid-year and year-end client letters are provided. Periodic text and program enhancements are available for download from the website.

The Premier Client Relationship Management Software for Financial Advisors. Includes:

- Contact Manager
- Automated Marketing
- Financial Planning Tools
- Practice Management Aids
- Resource Library

Manages mailings, appointments, tasks and educational text. More than 4,000 pages of prewritten text ready to use or edit for your preference. Easy to implement marketing campaigns to targeted contacts.

	Single User Version	Advisor & Staff Version	Small Firm Version	Full Network Version	
	$995	$1,495	$1,995	$2,495	$ ______
Annual Support (every June of year following) Automatic	$295	$330	$455	$515	
Non-Automatic	$325	$360	$545	$645	
Shipping and Handling					$ 15.00
For Delivery in Ohio – Add Appropriate Sales Tax					$ ______
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www.FinancialSoftware.com

License Options

Practice Builder Financial versions are available for every size office from the sole-practitioner, the "one man shop," to the multi-producer office with a large support staff. **Practice Builder** is designed for scalability and offers affordable steps between versions. There is no penalty imposed when stepping to the next version and all client data and communication history transfers automatically.

Single User Version (One User)

- Installed on one office computer and, if desired, also on a home computer or laptop to perform document review or look up contact information. Data is not automatically shared between the two installations. You may transfer data by e-mail or synchronize with Outlook using the optional Synchronization module. (Outlook can synchronize with a PDA giving you more portability.)
- Full system capability is limited to one user. User identity may be shared but simultaneous operation by multiple users is not permitted.
- If **Practice Builder** has been installed on a network server, or if you and your assistant are networked, you could have that staff assistant also access **Practice Builder** and perform tasks on your behalf (logged on to the system as the single user) such as sending letters or compiling reports. However, you both could not use the program at the same time. The staff person would be performing tasks just for the advisor, not independently.

Single Advisor & Staff Version (One Advisor and up to Four Staff)

- Installed on a local area network for only a single advisor (producer).
- Full system capabilities are extended to one advisor and four additional support staff. The advisor and all staff members may use **Practice Builder** simultaneously.
- Only one advisor may be installed, however, separate staff members can be assigned to particular clients, if desired. Full tasking and appointment network capabilities of the ToDo Module are available.
- Letters are produced over the signature of only the advisor and slight variations may trigger the use of alternate letter templates.

Small Firm Version (Three Advisors and up to Seven Staff)

- Installed on a local area network for up to three individual advisors.
- Full system capabilities are extended to the maximum of three advisors and seven additional support staff members. Full tasking and appointment network capabilities of the ToDo System are available.
- Letters may be produced over the signature of each advisor, but slight variations may trigger the use of alternate letter templates.

Full Network Version (Five Advisors and up to Ten Staff)

- Installed on a local area network for up to five individual advisors. (Note: Larger systems are available upon request.)
- Full system capabilities are extended to a maximum of five advisors and ten additional support staff members. Full tasking and appointment network capabilities of the ToDo Module are available.
- Letters may be produced over the signature of each advisor and each advisor may use a different letter template.
- Clients and prospects may be shared, or isolated, for each advisor while full access is controlled by administrative functions.

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