

Introducing the Automated Image Manager (AIM)

“AIM” towards a paperless office with Practice Builder’s Automated Image Manager

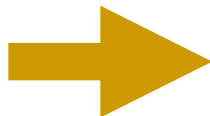
Automated Image Manager is the link between your TWAIN equipped scanner and your Practice Builder Client Relationship Management (CRM) system. AIM enables you to link, store, save, and retrieve any image your scanner processes. Anything you can scan, AIM can store and retrieve. From scanning a Drivers License to record for Patriot Act compliance or to use in Practice Builder photo file; or for adding PDF documents to incorporate into your library of documents. Or scan the client's quarterly report to retrieve easily—without digging through the filing cabinet.

Benefits you can achieve:

- Recover Lost Productivity
- Reclaim Office Space
- Improve Information Sharing
- Enhance Disaster Recovery



Maximize image storage capabilities within your Practice Builder



The Business Cost of Paper

- Time lost searching for files
- Mailing and faxing documents to clients
- Labor-intensive archiving of physical records
- Expensive physical storage space
- Document storage and retrieval mandated by multiple regulations
- The cumulative impact on overhead costs and quality of client services.

Consider the Cost of Responding to Client Requests

- How much time is lost searching through file cabinets for client's records?
- What are the labor cost of you and your staff?
- How long does the client wait for a response?
- How many other clients are kept waiting as you complete this process?

Now consider Meeting Those Demands with AIM

- Instantly retrieve records from your desktop
- Serve the client in minutes and move on to the next productive task
- Serve more clients with existing resources

Automated Image Manager Potential

- Instant Document retrieval to improve productivity
- Fast, economical e-mail document distribution
- Secure and reliable digital archiving
- Reduced physical storage space with digital media
- The cumulative benefits of reduced costs and more efficient client service

Automated Image Manager (AIM)



"AIM" towards a paperless office with Practice Builder's

Reclaim Office Space for Productive Activities

A dynamic business creates bulging file cabinets. With AIM, you store exact digital copies of your documents on unalterable media. You can reclaim office area consumed by paper, cut the cost of in-house and off-site storage and service more clients without leasing more expensive space.

- Use more of your office space for revenue-generating activities
- Reduce storage space needs with a variety of digital media options.
- Destroy or remove original paper documents.
- Reduce the burden of storing records according to regularly mandates.

Improve Communication with Staff, Reps, and Clients

Clients expect instant access to statements, reports and forms. AIM provides immediate, economical document distribution via CD and e-mail to satisfy these demands of doing business. Clients get what they want, staff get what they need, and everyone gets the added benefits of reduced labor, copying and mailing cost.

- Authorized staff instantly access documents
- Send information around the world with e-mail
- Distribute documents on CD to compliance officials

Enhance Business Continuity and Disaster Recovery Planning

Paper is a vulnerable archival medium. Fire, Flood and Theft threaten the integrity of paper archives. Duplicating paper documentation for off-site storage is an expensive, time-consuming process.

Digital Archiving with AIM simplifies disaster preparation and recovery and assures the long term accessibility of critical information.

- Store entire document repositories on durable CDs
- Non-proprietary JPG and PDF file formats maintain future accessibility

Recover Lost Productivity

The AIM retrieves documents instantly. Your staff lose fewer productive hours looking for documents while you gain time to use the information. Your documents remain immediately accessible when you need to make decisions, respond to clients or compile records for an audit.

- Locate documents on demand with AIM
- Reduce clerical labor and filing mistakes
- Encourage fast staff acceptance with easy to use

Update Notice

Unlike previous optional modules of Practice Builder and due to the nature of the AIM module the Annual Support and Maintenance for AIM will be added to your Annual update starting in June of the year following your purchase.

Name _____

Company _____

Address _____

City, State, Zip _____

Phone _____

E-mail _____

- Practice Builder
- | | |
|-----------------------|--------------|
| (Single User) | \$ 200 _____ |
| (Advisor & Staff) | \$ 250 _____ |
| (Small Firm) | \$ 300 _____ |
| (Full Network) | \$ 350 _____ |
| Shipping and Handling | \$ 15 _____ |

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