

# PracticeBUILDER FINANCIAL

## Optional Modules

**Each Module Requires the Basic Practice Builder System**

		Single User Version	Advisor & Staff Version	Small Firm Version	Full Network Version	
<b>Automated Image Manger</b>	Enables you to link, store, save, and retrieve any image your scanner processes. Anything you can scan, AIM can store and retrieve.	\$200	\$250	\$300	\$350	\$ _____
<b>Outlook Sync</b>	Syncs your basic Practice Builder Client/Prospect Data with Microsoft Outlook Contacts, which can then be synced with a Palm or other PDA.	\$100	\$150	\$200	\$250	\$ _____
<b>Estate Planning</b>	Campaign targeting affluent individuals, with many articles to create interest in having an estate plan reviewed/prepared.	\$200	\$250	\$300	\$350	\$ _____
<b>E-mail Marketing</b>	Delivers Automatic Marketing materials to all e-mail addresses by contact. (Requires the Marketing Module)	\$100	\$175	\$250	\$325	\$ _____
<b>Seminar Marketing</b>	Automates seminar attendee tracking and follow-up. Generates series of pre and post seminar letters, articles and calls to maximize the "harvesting" from your seminar attendees.	\$400	\$450	\$500	\$550	\$ _____
<b>Compliance</b>	Record keeping, disclosure and pre-audit instructions and liability reduction tools. For Registered Investment Advisors. Legal components provided by noted authority, Jeffrey Kelvin, JD.	\$500	\$500	\$500	\$500	\$ _____
<b>Business Records</b>	Corporate articles, by-laws, minutes, resolutions for use by the advisor with clients or for the advisor's personal/business use.	\$100	\$125	\$150	\$175	\$ _____
<b>Business Planning</b>	Text for development of business plans and consulting services for business clients. Also valuable for advisor's own business	\$100	\$125	\$150	\$175	\$ _____

**Sub Total** \$ \_\_\_\_\_  
**Shipping & Handling** \$ 15.00  
 \$ \_\_\_\_\_  
**Total** \$ \_\_\_\_\_

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