



PracticeBUILDER FINANCIAL

What can Client Relationship Management (CRM) do for you? Why do you need a tool like my Practice Builder Financial in your practice?

My friend, Maribeth Kuzmeski, stated the dilemma very well in her newest book. She wrote, "Financial advisors have a lot of competition. Think about it. There are hundreds of thousands of financial advisors and insurance agents. A seemingly unlimited drove of financial products. Thousands of mutual funds. And all of this boils down to one simple disheartening fact: **you are in serious peril of becoming a commodity.**"

"Your only recourse is to prove that you are different. That you are *better*. That you offer your clients something above and beyond the services offered by your competitors."

CRM systems allow you to use technology to differentiate yourself while communicating more and maintain "Top of Mind Awareness." CRM can leverage your abilities across a larger client base - easily and with less demand on the time that you need to be spending one-on-one with your clients and prospects. Take your "Best Practices" and multiply them across targeted clients, prospects and referrals.

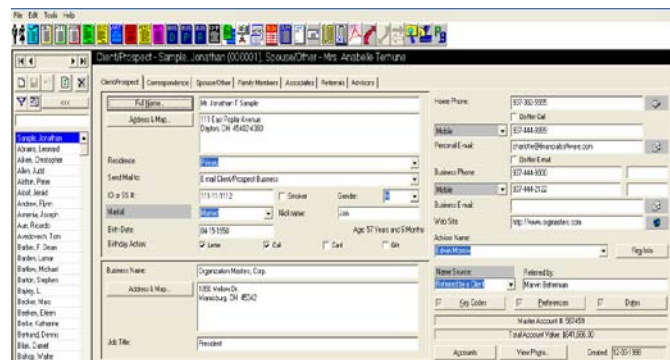
As competition increases, as market conditions drive you to make changes for more productivity and as your desire to work less for more reward, CRM stands alone as a tool that can help you easily and economically. I invite you to find out more about **Practice Builder Financial** and the impact CRM can make in your practice.

Ed Morrow, CLU, ChFC, CFP®, CEP, RFC®

Originally conceived and introduced in 1983, Ed Morrow's **Practice Builder Financial** is a mature, fully featured CRM system. Built around "Best Practices" of financial planners the system is designed to help you every step of the way - from prospecting for new clients to generating and harvesting referrals from your most satisfied "A" clients.

The list of features and benefits is extensive. Here is just a sample:

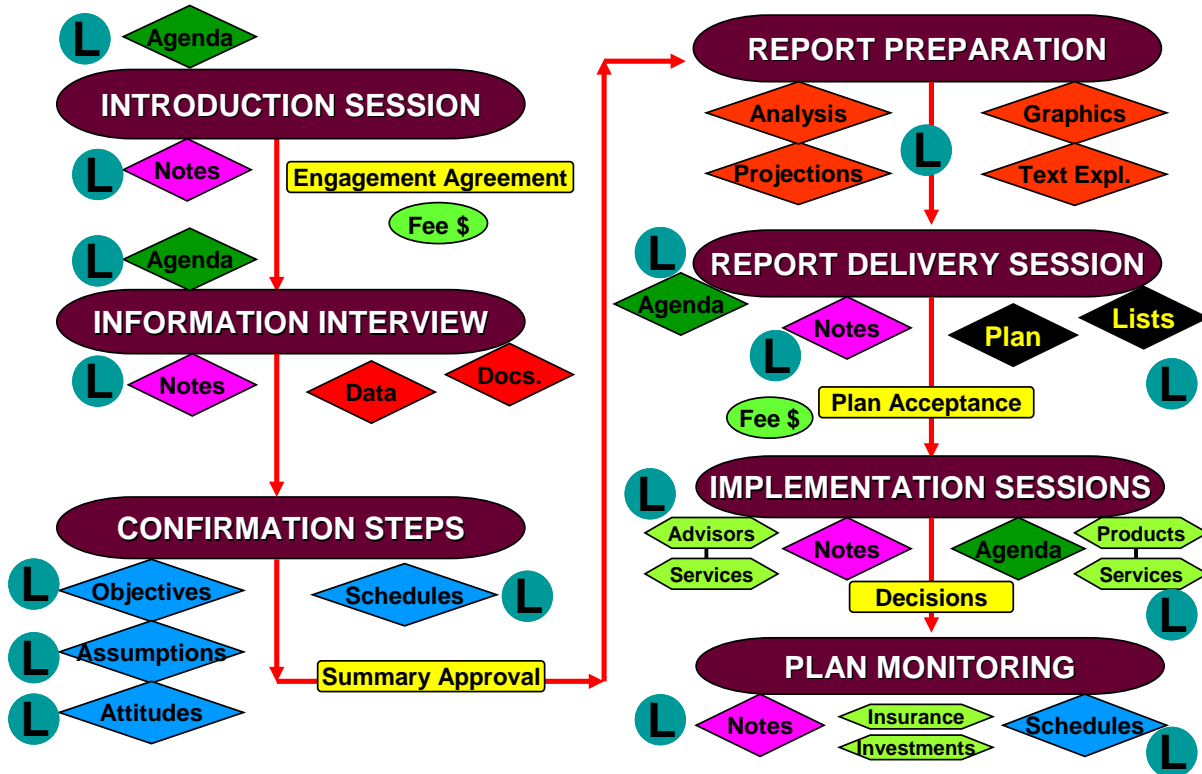
- A library of thousands of pages of financial text. Letters, articles, agendas and more. Use it as is, or edit any item to suit your personality or needs. Constantly updated and new subjects added regularly
- Toll-free and e-mail support to answer the "How do I..?" or "Help me with..."
- Full function calendar. A ToDo system that lets you set up appointments and tasks, link them to contacts, and even assign them to others. Reminders to keep you on time!
- Seven marketing campaigns, sequences prewritten, ready to implement. Change the content or the frequency as you wish. Deliver by mail or by e-mail.
- Every action recorded for liability protection and due diligence.



The back of this form shows a chart of "The Counseling Process." **Practice Builder Financial** was built to automate this process. Take a look at this chart. How many of these steps are you performing now? How many are you neglecting simply because they are too time consuming? We have the answer - use technology to your advantage. Expand your clientele—not your work!

You are **not** required to change your practice to use **Practice Builder Financial** but as you find more tools that mesh so easily with your daily activities you will quickly discover that **Practice Builder Financial** is enhancing your practice.

The Counseling Process



Whether you are a fee-only or a fee and commission financial planner, insurance agent, CPA, or portfolio manager the process and procedure in your practice includes all or parts of this counseling process. The round "L" symbols represent letters - communication at the heart of building and cementing relationships. The Agendas, Notes, Objectives, Attitudes, Letters and other documents can all be produced by Practice Builder Financial and the copy is included for you to quickly review and edit.

- You want to differentiate yourself.
- You would like to communicate more often and more effectively.
- You want to spend more time doing what makes you money—meeting with clients.
- You want your practice to work harder and more profitably for you.
- You want to reduce your professional liability with better communication and records.

I am not interested – Please remove me from the mailing list.

Please contact me to reserve space in the next Free Live Web Demo of Practice Builder Financial.

Name: _____ Firm: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ E-mail _____

Fax to: 513 424 5752
Financial Planning Consultants