

# PracticeBUILDER FINANCIAL

## Monthly Subscription

Financial advisors can now employ **Practice Builder Financial**, and reap the benefits of this professional Client Relationship Management (CRM) system for an incredibly low price. This special offer has been structured to allow for lower initial cash flow while enabling immediate benefit of Practice Builder capabilities. This offer consists of:

- Practice Builder Financial** – with all articles, letters, agendas and practice features
- Marketing Module** that provides Drip Marketing to prospects, clients and advisors
- E-mail Marketing** to enable automated electronic Drip Marketing without postage cost
- Personal E-mail or Phone Support** to install software, begin implementation and start your drip marketing.

Now you can use a powerful CRM technology to differentiate yourself, expand your frequency of contact, improve your practice, generate more referrals and elevate your clientele.

You get all five functions that comprise a true CRM system: the contact manager; the financial planning aids; the marketing campaigns; practice management tools and the complete resource library. Included with your purchase is the highly regarded Technical Support provided by Financial Planning Consultants, web updates and system enhancements, thousands of pages of pre-written text, the Year-End and Mid-Year Planning Memos, and more. Support is an e-mail or toll-free call away and optional specialized training or data file manipulation is also available.

### PracticeBUILDER Monthly Subscription

	Initial Cost	Monthly Fee	
<input type="checkbox"/> Single User Version (One User)	\$199	\$49	\$ _____
<input type="checkbox"/> Advisor & Staff (One Advisor and up to Four Staff)	\$299	\$69	\$ _____
<input type="checkbox"/> Small Firm Network (Three Advisors and up to Seven Staff)	\$399	\$89	\$ _____
<input type="checkbox"/> Full Network (Five Advisors and up to Ten Staff)	\$499	\$109	\$ _____
		Sub Total	\$ _____
		Shipping and Handling	\$ 15.00
		<i>For Delivery in Ohio – Add Appropriate Sales Tax</i>	\$ _____
		<b>Total</b>	<b>\$ _____</b>

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**Fax to: 513 424 5752**

**Financial Planning Consultants - P.O. Box 42430 - Middletown, OH 45042-0430 - Phone: 800 666 1656**  
**www.FinancialSoftware.com**

**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.