

PracticeBUILDER FINANCIAL

Optional Modules

Each Module Requires the Basic Practice Builder System

| | | Single User Version | Advisor & Staff Version | Small Firm Version | Full Network Version | |
|-------------------------------|--|---------------------|-------------------------|--------------------|----------------------|----------|
| Automated Image Manger | 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 | \$ _____ |
| Outlook Sync | 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 | \$ _____ |
| Estate Planning | Campaign targeting affluent individuals, with many articles to create interest in having an estate plan reviewed/prepared. | \$200 | \$250 | \$300 | \$350 | \$ _____ |
| E-mail Marketing | Delivers Automatic Marketing materials to all e-mail addresses by contact. (Requires the Marketing Module) | \$100 | \$175 | \$250 | \$325 | \$ _____ |
| Seminar Marketing | 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 | \$ _____ |
| Compliance | 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 | \$ _____ |
| Business Records | 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 | \$ _____ |
| Business Planning | Text for development of business plans and consulting services for business clients. Also valuable for advisor's own business | \$100 | \$125 | \$150 | \$175 | \$ _____ |

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