



TECHNOLOGY PLATFORM OFFERINGS

- **Automated Financial Services (AFS)** - Contact: Virginia Vick
vvick@capital-invest.com 1-919-831-2370 ext. 226
 - Front end broker workstation – [3 levels](#)
 - Trading, quotes, research, performance
 - DST interface for Direct Mutual Funds, Variable Annuities, and REIT's
 - COST: \$40 gold, \$60 platinum, +\$20 for streaming quotes (all monthly)
- **Broker Dashboard** - Contact: Virginia Vick
vvick@capital-invest.com 1-919-831-2370 ext. 226
 - Supplemental broker workstation
 - Account, practice and sales management, performance – [FAQ](#)
 - DST interface (later)
 - COST: \$25 monthly
- **Advisor Vision** - Contact: Jill Ross, jross@adviceamerica.com
1-510-824-3731
 - Complete financial planning platform - [3 levels](#)
 - Automatic “FREE” download of all SAL Information
 - DST interface
 - COST: Comprehensive \$149.50, Goal \$99.50, Investment \$79.50 (all monthly)
- **DST Vision** - Contact: DST Service Desk: 1-800-435-4112 (or click here for set-up instructions)
 - Direct Mutual Funds and Variable Annuities
 - COST: Free
- **Advisor Tools** - Contact: Paul Freet, 1-888-286-6578 ext. 705
 - Web-based Practice Management Platform (CRM) with DST Interface
 - Helps manage your book and your daily operations
 - COST: \$14.95 monthly
- **Morningstar** – Contact: PMR/SALI Team at 1-877-374-3918
 - Powerful research, sales, diagnostic, reporting, and portfolio tools
 - Ability to import all SAL Account Information
 - COST: Free Trial then \$180 monthly

IF / THEN Scenarios

- IF...you are doing DIRECT business only,
THEN... you may want to explore [DST Vision](#) for account management,
OR... explore [AFS](#) since they have a DST interface also, however not as robust as the DST product,
AND... explore [Advisor Vision](#) for financial planning as they have a DST interface.
AND... explore [Advisor Tools](#) for Web – based Practice Management.
- IF... you are doing all of your business through SAL,
THEN...you will want to be on the [AFS](#) platform,
AND... explore [Broker Dashboard](#) for a more complete desktop workstation,
AND... explore [Advisor Vision](#) for financial planning since they interface with SAL.
AND... explore [Advisor Tools](#) for Web – based Practice Management.
AND... explore [Morningstar](#) for Research and Portfolio Tools
- IF... you are doing business with SAL and doing Direct business,
THEN... you may find the [AFS](#) platform sufficient due to the DST interface, which will provide “aggregation” of your direct business,
AND... explore [Broker Dashboard](#) for a more complete desktop,
AND... explore [Advisor Vision](#) for financial planning since they interface with SAL and DST
AND... explore [Advisor Tools](#) for Web – based Practice Management.