TECHNOLOGY RECOMMENDATIONS

Pershing's revolutionary platform provides the tools needed to manage and trade your clients' accounts, deliver first-rate service and develop new sales and revenue opportunities. Learn about Pershing's Digital Experience and download the NetX360 desktop application.

Contact: Amy Howell – ahowell@capital-invest.com

Albridge Wealth Reporting seamlessly integrated with a single sign on from Pershing's Netx360 enables you to consolidate client account data from hundreds of diverse sources: proprietary fees, banking, brokerage, insurance, retirement, managed accounts, alternatives and trusts. It also quickly produces and distributes consolidated client performance reports covering performance, asset allocation, holdings, transactions, benchmarking, cost basis and client access.

Contact: Robin VanBurik – rvanburik@capital-invest.com **COST (Netx & Albridge) $150.00 monthly**

Access to Hundreds of Pre-Approved Professionally Authored Marketing Messages. Seamless Integration with the Redtail CRM

Peter Montoya Inc. is the leader in marketing automation for Financial Professionals – providing an online library of thousands of professionally written marketing materials, compliance interaction for pre-review of materials, automated campaigns, email, direct mail and more.

Go To: www.marketinglibrary.net and select the Subscribe tab. **COST: $10.00 monthly**

Client Relationship Management (CRM) with Integration to SAL Account Information through Ecustody.

Redtail CRM is a web-based, easy-to-use client management solution designed specifically for Financial Professionals. It features Online Calendaring and Task Management, Low Cost of Ownership and Complimentary Database Conversions.

Contact: Tim Minert - tim@redtailtechnology.com or 1-800-206-5030

COST: $60 monthly for one advisor with up to 15 administrative logins

Internet-Based Financial Planning Software. Data Integration with ECustody or Redtail CRM.

MoneyGuidePro - Its unique client-centered approach supports a sophisticated, goal-oriented planning process that is more meaningful to the client and more productive for the advisor. It contains a number of capabilities not often found at this price, as well as the ability to collaborate with your client and your client's other advisors over the Web.

Contact: Tom Roberts - tom@moneyguidepro.com or 800-819-2347 **COST: $995 Annually thru Pershing affiliation**

Use Your Existing Client Data to Automatically Populate Forms.

Laser App Software is the premier e-forms provider in the financial services industry. Laser App creates highly integrated solutions that combine state-of-the-art forms-filling technology with its massive library of industry related forms. Financial forms are filled instantly and with consistency, reducing the redundancy of data entry.

Contact: Tess Ramby - tramby@capital-invest.com **COST: $499 initial purchase - $219 year thereafter**

The Back Room Technician — The ONLY software program that combines fast easy needs analysis with persuasive client education and presentation tools in a single interface. Included to motivate your clients and prospects are over 600 Educational Reports / Graphics / Charts; 60 simple input calculators and 11 needs analysis for topics such as Retirement, Life Insurance, Business Continuation, College Funding, Personal Finance, Asset Allocation, Long Term Care, Disability, Accumulation Funding , Estates & Trusts and Charitable, Back Room Technician. In business for 30 years, Back Room Technician is used for tens of thousands of financial advisors every day.
Click here for more information.

Contact: http://www.brtnow.com **COST: Free Trial Available – Starting at $399 Package Prices Vary**

DST Vision Interactive Web Site Providing Real-Time, Reliable Information for the Majority of Your Directly Held Accounts.

DST Vision is the premier financial advisor web site, providing access to mutual funds, variable annuities, Real Estate Investment Trusts (REITs) and Direct Participation Programs (DPPs).

DST Vision is the web site most widely used by financial intermediaries for access to customer account information from more than 270 mutual fund and variable annuity companies. Vision provides simple, interactive tools that help advisors manage accounts more efficiently. There is no charge for Vision.

- View aggregate book-of-business assets, as well as total number of accounts and total assets by fund.
- Group individual accounts into customized client portfolios and households.
- View detailed customer account information including registration information, transaction history, cost basis, and tax summary information.
- Access and print standard shareholder statements.

To enroll, view an online demo, or get more information, visit www.dstvision.com, or call 800.435.4112.

Vision Professional is aggregation PLUS brokerage data delivered through advisor-branded customer reports. There is a $35/monthly charge for Vision Professional.

- **Expanded aggregation** – to include Sterne Agee brokerage data
- **ADVISOR BRANDED customer reports** - most current data and quarter-end balances

View their demo at www.globalclientlist.com/vpp/ or contact them at **1-816-435-1527** or visionprofessional@dstsystems.com . To enroll log into your existing DST Vision account and click the Enroll button on the Professional Tab. **COST: $35.00 monthly**