

# SOFTWARE INTEGRATION

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CRM, Account Management, Trading, Quotes, Research, Online Statements and Confirms. Featuring Automated Integration With Numerous Technology Software Companies.

**eCustody Workstation** - SAL's new front-end broker workstation, providing the tools you need to manage virtually every aspect of your practice from a single, intuitive platform.

Contact: Amy Howell - [ahowell@capital-invest.com](mailto:ahowell@capital-invest.com)

COST: \$75 monthly for basic access



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: Chris Roberts - [chris@redtailtechnology.com](mailto:chris@redtailtechnology.com) or 1-800-206-5030 x1004

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



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

**Peter Montoya Inc.** is the nation's only advertising agency specializing in the Financial Services Industry. For more than a decade they've been helping Financial Professionals increase profits and improve their practices through strategic coaching, personal training, custom-developed brochures, copywriting, web sites and logos, and compliance review marketing.

Go To: [www.marketinglibrary.net](http://www.marketinglibrary.net) and select the **Subscribe** tab. COST: \$10.00 monthly



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](mailto:tom@moneyguidepro.com) or 800-819-2347 COST: \$83 monthly – Unlimited Clients



Powerful Research, Diagnostic, Reporting, and Portfolio Tools with Integration to SAL Account Information through eCustody.

**Morningstar Advisor Workstation** is a complete investment planning platform. It prepares advisors with the latest Morningstar investment data, tools, and reports. It offers seamless integration with popular advisor systems and automatically brings in current client and account data for the clearest view of an advisor's book of business.

Contact: Adam Stolz - [adam.stolz@morningstar.com](mailto:adam.stolz@morningstar.com) or (312) 696-6912 COST: Free Trial then \$179 monthly



Use Your Existing Client Data from Redtail CRM to Automatically Populate Forms.

**Laser App Software** combines state-of-the-art form filling technology with a massive library of industry related forms. Forms are maintained by Laser App so reps can focus on their clients, rather than filling out paperwork.

Contact: Tess Ramby - [tramby@capital-invest.com](mailto:tramby@capital-invest.com)

COST: \$299 initial purchase - \$199 year thereafter



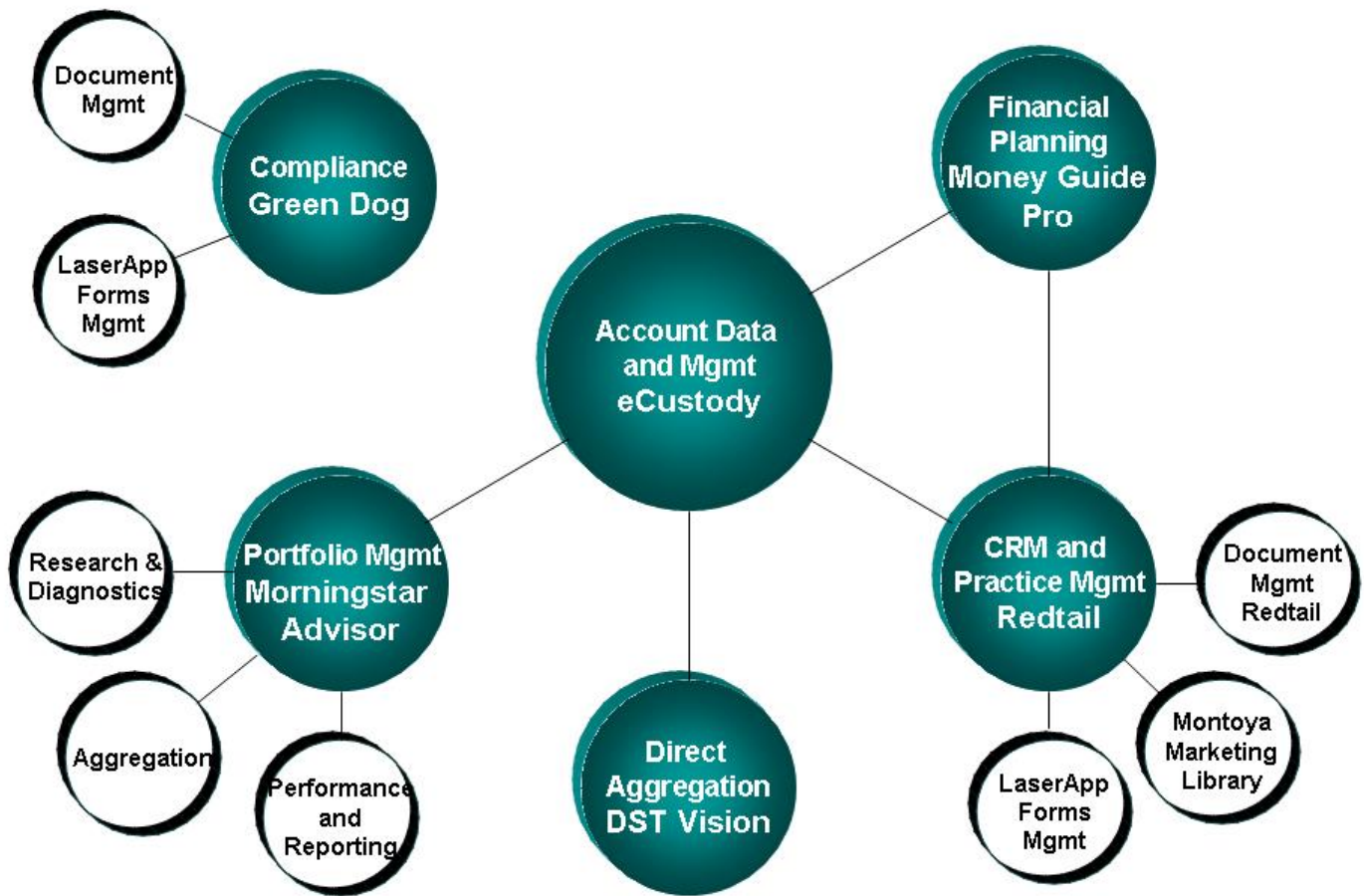
Interactive Web Site Providing Real-Time, Reliable Information for the Majority of Your Directly Held Accounts.

**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).

Contact: DST Service Desk: 1-800-435-4112

COST: FREE or \$40 monthly for custodial aggregation

# INTEGRATION DIAGRAM



## IF / THEN Scenarios

- IF...you are doing DIRECT business only,
  - THEN... you may want to explore DST Vision for direct account access,
- IF... you are doing all of your business through SAL,
  - THEN... you will want to be on the ECustody platform, which integrates with
    - Red Tail Technology for web based practice management,
      - AND... explore LaserApp for automated forms completion,
      - AND... explore Marketing Library for marketing and advertising messages,
    - Morningstar for Research and Portfolio Tools,
    - Money Guide Pro for financial planning
- IF... you are doing business with SAL and Direct business,
  - THEN... you may want to explore DST Vision for their new aggregation feature,
  - OR... continue to use AFS and it's aggregation feature with DST.
  - OR... explore Red Tail Technology and add on aggregation services from sources such as Albridge or EMoney.
    - AND... explore Money Guide Pro for financial planning
    - AND... explore LaserApp for automated forms completion,
    - AND... explore Marketing Library for marketing and advertising messages,