



**Save Time! Call Toll Free 800 799-4267**

The pricing below is for installing Advisors Assistant to your local computer or network. For **Web-Based Pricing**, which starts at \$39/month and varies based on number of users and modules being used, please call (800) 799-4267.

Registered Owner \_\_\_\_\_  
 Business Name \_\_\_\_\_  
 Street Address \_\_\_\_\_  
 City/State/Zip \_\_\_\_\_  
 Phone Numbers Voice: \_\_\_\_\_ Fax: \_\_\_\_\_  
 Email \_\_\_\_\_

*System Requirements: For complete hardware requirements please see the "How To Order" page on our website.*

**Single Computer Version**

<input type="checkbox"/> Advisors Assistant CRM	\$499.00	\$ _____
<input type="checkbox"/> Insurance Module	\$229.00	\$ _____
<input type="checkbox"/> Investment Module	\$399.00	\$ _____
<input type="checkbox"/> Insurance Commission Module	\$399.00	\$ _____
<input type="checkbox"/> Additional Single Computer License	\$199.00	\$ _____

**Network Version** (Every User Sees All Names)

<input type="checkbox"/> Advisors Assistant CRM (includes 2 users)	\$899.00	\$ _____
<input type="checkbox"/> Additional Stations (# of additional users _____)	\$99.00 each	\$ _____
<input type="checkbox"/> Insurance Module	\$329.00	\$ _____
<input type="checkbox"/> Investment Module	\$499.00	\$ _____
<input type="checkbox"/> Insurance Commission Module	\$499.00	\$ _____
<input type="checkbox"/> Additional Single Computer License	\$199.00	\$ _____

**MultiProducer Version** (Access to names can be limited for each user)

<input type="checkbox"/> Advisors Assistant CRM (includes 3 users)	\$1,699.00	\$ _____
<input type="checkbox"/> Additional Users (# of additional users _____)	\$199.00 each	\$ _____
<input type="checkbox"/> Insurance Module	\$429.00	\$ _____
<input type="checkbox"/> Investment Module	\$599.00	\$ _____
<input type="checkbox"/> Insurance Commission Module	\$599.00	\$ _____

**Download Programs** (Check all that apply)

- |                                       |   |  |  |                                     |
|---------------------------------------|---|--|--|-------------------------------------|
| <input type="checkbox"/> Albridge*^   | <input type="checkbox"/> First Clearing | <input type="checkbox"/> Schwab          | <input type="checkbox"/> Trust Co. America | <u>INSURANCE</u>                    |
| <input type="checkbox"/> DAZL         | <input type="checkbox"/> LPL            | <input type="checkbox"/> SEI             | <input type="checkbox"/> Vision 20/20      | <input type="checkbox"/> MassMutual |
| <input type="checkbox"/> DST FAN Mail | <input type="checkbox"/> Pershing       | <input type="checkbox"/> Sterne Agee     | <input type="checkbox"/> Wedbush           | <input type="checkbox"/> Ameritas^  |
| <input type="checkbox"/> Fidelity/NFS | <input type="checkbox"/> RBC            | <input type="checkbox"/> T.D. Ameritrade |  |                                     |

\* Account Positions Only    ^ No Charge For Module

<input type="checkbox"/> 1 Download Program	\$599.00	\$ _____
<input type="checkbox"/> Each Additional Download Program	\$499.00 each	\$ _____

**(Carry to other side) SUBTOTAL**      \$ \_\_\_\_\_

## SunGard Download Service

- \$15.00/month for one user + \$1.50/month for each additional user  
Monthly bank debit or credit card payment required. Three month minimum purchase required. \$ \_\_\_\_\_

## Scanning Solutions

### Imaging Assistant® Computer-Based Scanning

- Single/First Imaging Assistant User \$399.00 \$ \_\_\_\_\_  
 Each Additional Network/MultiProducer User \$ 59.00 \$ \_\_\_\_\_

*You must have the same number of Imaging Assistant™ users as your Advisors Assistant®.*

### ReadyDoc® Web-Based Scanning

\$59/month for the first 10GB of storage and 25 users. Setup fees apply.

Call 800-799-4267 for additional information.

## Sales Tax, Shipping & Handling Charges

	<b>SUBTOTAL from front</b>	\$ _____
<input type="checkbox"/> Sales Tax (California Only)	8.0%	\$ _____
<input checked="" type="checkbox"/> Shipping - Fed-Ex Second Day Air (AK & HI \$35.00, Canada \$45.00)	\$25.00	\$ _____
	<b>GRAND TOTAL</b>	\$ _____

## Payment Options

- Visa     MasterCard     AMEX     Discover     Check Enclosed

Card Number \_\_\_\_\_ Expires \_\_\_\_/\_\_\_\_ Zip Code \_\_\_\_\_

Cardholder's Signature \_\_\_\_\_ Security Code \_\_\_\_\_

*Prices Subject to Change Without Notice*

## Annual Subscription Renewal Pricing

Each computer-based Advisors Assistant comes with a full year of FREE 800 Line Support and a full year of FREE Updates from our website. **At the end of your first year**, you can subscribe to another year of 800 Line Support and Updates. If you are using the Investment Download Programs, you must keep the entire program up to date to continue to download new investment transactions.

The Annual Subscription Cost depends on the program and modules that you own. Please call Client Marketing Systems for a quote on your annual subscription cost.

Web-based Advisors Assistant is priced monthly and all support and updates are included for the time of your subscription.

**Client Marketing Systems, Inc.** 880 Price Street, Pismo Beach, CA 93449

◆ 800 799-4267 ◆ 805 773-7981 ◆ FAX: 805 773-7985 ◆ [www.AdvisorsAssistant.com](http://www.AdvisorsAssistant.com)