ACT!

for Financial Professionals | For ACT! Users

Leverage the Power of ACT! with a Solution Designed for You

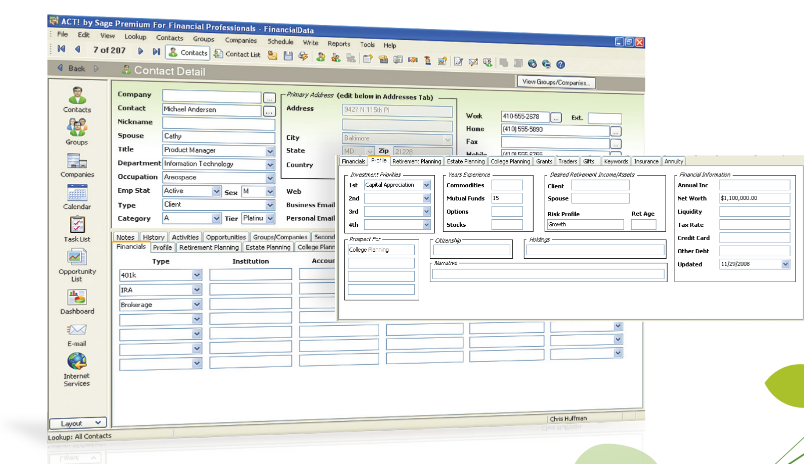
ACT! by Sage for Financial Professionals 11 delivers the world-class contact management capabilities included with ACT! by Sage, plus extensive added features for tracking and managing financial information. These features allow you to better track financial portfolios and personal profiles; segment your clients to provide superior, tailored service; bookmark contact records for quick navigation; keep up with clients moving between residences; and record critical notes with high visibility. ACT! for Financial Professionals helps you keep your client information organized and your follow-ups on track so you'll have more time to focus on what's important—maximizing your earning potential by attracting and retaining key clientele.

Capture Key Financial Portfolio and Planning Information

Capture account, investment, and financial planning information in tabs designed specifically for financial advisors. These financial-specific tabs and layouts allow you to track and manage a client's complete financial picture. Using a lookup, you can easily sort this information to better manage your relationships. For example, if you want to quickly grab a list of all clients with a specific account balance, you can create a lookup on that field and then group those clients for future reference.

Keep Your Clients' Family Details and Interests Close at Hand

Keep personal details about each client, including children's names, ID numbers, birthdays, interests, and more. This way, you'll impress clients by remembering these details and can refer to them during financial planning. You can also associate keywords with each client, such as an attribute or interest, for quick recall later. For example, if your clients enjoy golf, you can associate that as a keyword and pull a list of all your clients who like to play golf, then invite them to an upcoming tournament.



- Maintain a comprehensive financial portfolio with detailed information on all client accounts and assets.

BENEFITS SNAPSHOT

Leverage the power of ACT! with fields and tabs designed for financial advisors, and further customize[1] any of these tools to your exact needs.

Capture business-critical information about each client's or prospect's financial and personal profile.

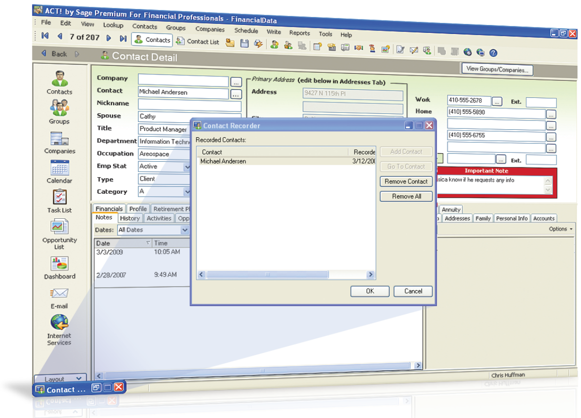
Provide a tailored level of service on par with each client's financial status by segmenting them according to their financial profile.

Communicate critical notes to your assistant or other team members with high visibility.

Always keep the primary address for a client current even if they have multiple residences.

CALL 1-866-903-0006

CONTACT YOUR ACT! CERTIFIED CONSULTANT | VISIT WWW.ACT.COM/UPGRADE



- Bookmark client records for quick navigation and a reminder to create a follow-up or record notes from a call.

Segment Your Clients According to their Financial Status

Segment your client and prospect lists by category and tier so you can group them for use in mail merges or enable quick lookups by client segment to perform similar actions on each. For example, if you always complete a particular process with your Tier 1 clientele, mark them as Tier 1 and then create a custom activity series and/or sales process indicating your typical series of stages or action and quickly apply it to each.

Mark Client Records for Quick Navigation

Use the bookmarking feature to mark a Contact Record to return to it at any time using a single click. This feature can serve as a reminder to schedule a follow-up after speaking with a client—just bookmark the client and check the Contact Recorder throughout your day for a quick reminder to set a call back or other follow-up.

Keep Addresses and other Client Details Up-to-Date

Keep client records current with a layout for up to four addresses to designate work, home, vacation home, etc. Then, promote an address to the main Contact Detail view indicating which address is the most current to ensure your communications go to the right place.

Record Important Notes for Team Collaboration

Highlight any critical information regarding a client right on the Contact Detail view, called out in the Important Notes field. This way, you can quickly communicate important details to your assistant or other advisor team members concerning a particular client.

"ACT! for Financial Professionals enables me to be more organized and set alarms for things that need to be done at a certain time. Love the program!! I have been a customer for over 10 years!!"

— Denise Nostrom
Financial Advisor

About ACT!

The #1 selling contact and customer management solution for over 20 years, ACT! by Sage continues to bring the latest, most intuitive technology to businesses across the globe. ACT! solutions have more than 2.8 million individual users and 48,000 corporate customers in 25 countries, including individuals, small businesses, selling professionals, and corporate teams. Because ACT! solutions support an "anywhere" workforce with seamless online, offline, and mobile access solutions, they work for any business environment. With ACT!, you can achieve maximum productivity so you have time to focus your attention on business-critical activities, provide a better customer experience because you understand the intricate needs of your contacts, and make informed decisions to advance your business.

About Sage CRM Solutions

Sage CRM Solutions is a portfolio of market-leading applications consisting of ACT! by Sage, SageCRM, and Sage SalesLogix. Over 63,500 organizations and 3.1 million users worldwide rely on Sage CRM Solutions to develop profitable, long-term business relationships.

Important Note: Sage recommends you carefully review all ACT! system requirements at www.act.com/2009systreq to ensure your system meets these requirements. **Compatibility:** ACT! for Financial Professionals 11 cannot be used in conjunction with ACT! Premium for Financial Professionals 11, and both cannot be used in conjunction with ACT! 2009, ACT! Premium 2009, or ACT! Premium for Web 2009. **Regarding ACT! for Palm OS®**: ACT! for Financial Professionals 11 solutions are not compatible with ACT! for Palm OS 2.0. **Regarding ACT! Add-on Solutions:** Certain ACT! add-on solutions may not be compatible with ACT! for Financial Professionals 11 solutions. Please visit www.actsolutions.com or check with your add-on product provider to determine compatibility.

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[1] All customization within design layout is allowed with exception of removing or adding ACT! for Financial Professionals custom controls (these include age text box, household text box, and custom button).

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