



# Order Form

Prices Effective January 1, 2010

Save Time! Call Toll Free 800 799-4267 or FAX your order to 805 773-7985

The pricing below is for installing Advisors Assistant to your local computer or network. For **Web Hosted Pricing**, which starts at \$35/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	\$199.00	\$ _____
<input type="checkbox"/> Investment Module	\$399.00	\$ _____
<input type="checkbox"/> Insurance Commission Module	\$299.00	\$ _____
<input type="checkbox"/> Additional Single Computer License	\$199.00	\$ _____

## Network Version (Each 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	\$299.00	\$ _____
<input type="checkbox"/> Investment Module	\$499.00	\$ _____
<input type="checkbox"/> Insurance Commission Module	\$399.00	\$ _____
<input type="checkbox"/> Additional Single Computer License	\$199.00	\$ _____

## MultiProducer Version (Access to names can be limited by Producer Name)

<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	\$399.00	\$ _____
<input type="checkbox"/> Investment Module	\$599.00	\$ _____
<input type="checkbox"/> Insurance Commission Module	\$499.00	\$ _____

## Download Programs (Check all that apply)

- |                                       |   |                                   |   |   |
|---------------------------------------|---|-----------------------------------|---|---|
| <input type="checkbox"/> Albridge     | <input type="checkbox"/> First Clearing       | <input type="checkbox"/> Pershing | <input type="checkbox"/> SEI                  | <input type="checkbox"/> Wedbush Morgan |
| <input type="checkbox"/> DAZL         | <input type="checkbox"/> First Trust/Datalynx | <input type="checkbox"/> Rydex    | <input type="checkbox"/> T.D. Ameritrade      | <input type="checkbox"/> XMLife (ACORD) |
| <input type="checkbox"/> DST FAN Mail | <input type="checkbox"/> Jefferson Pilot      | <input type="checkbox"/> SAL      | <input type="checkbox"/> Trust Co. of America |   |
| <input type="checkbox"/> Fidelity/NFS | <input type="checkbox"/> LPL                  | <input type="checkbox"/> Schwab   | <input type="checkbox"/> Vision 20/20         |   |

<input type="checkbox"/> 1 Download Program	\$399.00	\$ _____
<input type="checkbox"/> Each Additional Download Program	\$199.00 each	\$ _____

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

## SunGard Download Service

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- \$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. \$ \_\_\_\_\_

## Imaging Assistant™ Scanning Module – Special Introductory Pricing

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- Single/First Imaging Assistant User \$399.00 \$ \_\_\_\_\_  
 Each Additional Network/MultiProducer User \$ 89.00 \$ \_\_\_\_\_

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

## Marketing Tools

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- Red Zone Marketing Book by Maribeth Kuzmeski\* \$9.95 \$ \_\_\_\_\_  
 Red Zone Marketing CD by Maribeth Kuzmeski\* \$29.95 \$ \_\_\_\_\_  
 Red Zone Package: Book & CD by Maribeth Kuzmeski\* \$35.95 \$ \_\_\_\_\_

*\*Special Red Zone Marketing Pricing for Advisors Assistant Users Only*

## Sales Tax, Shipping & Handling Charges

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- SUBTOTAL from front** \$ \_\_\_\_\_
- Sales Tax (California Only) 8.25% \$ \_\_\_\_\_  
 Shipping - Fed-Ex Second Day Air (AK & HI \$25.00, International Orders \$75.00) \$20.00 \$ \_\_\_\_\_
- GRAND TOTAL** \$ \_\_\_\_\_

## Payment Options

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- Visa     MasterCard     AMEX     Discover     Check Enclosed

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

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

*Prices Subject to Change Without Notice*

**You Can Use Advisors Assistant Over the Internet.  
Call (800) 799-4267 for More Information.**

## Annual Subscription Renewal Pricing

Each 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.

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**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)

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