Act4Advisors

Allied Financial Software, Inc.

ACT!™ by Sage

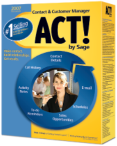
Certified Consultant

"Manage your relationships and stay on target of your goals."

Act4Advisors is a customized ACT!™ database and design specifically for financial services professionals. With our 21 years of experience in financial services and ACT!'s experience with contact management, we have designed Act4Advisors with the needs of most financial professional's in mind.

Client, Contact and Office Management for:

- Financial Planners
- Investment Advisors
- Insurance Professionals



**Act4Advisors requires the ACT! software sold separately or in a bundle.*

Customized Features Include:

- Personal Data Fields - (DOBs, Family Information, SSNs, Drivers Licenses, additional Phone Numbers and Address Fields, etc.)
- Track various levels of Suspects and Prospects
- Service and Marketing Campaigns
- Insurance Policies and Accounts
- Manage Preferred Mailing Address
- Suitability and Compliance built in
- Built in Scanning and Document Management feature from within ACT!
- Track Birthdays, Anniversaries, RMD, and other important dates
- Interfaces to third party products and so much more.

10% Off with Promo Code

NVAD0627

Call for a Demo: 800.831.7636 Web site: www.act4advisors.com