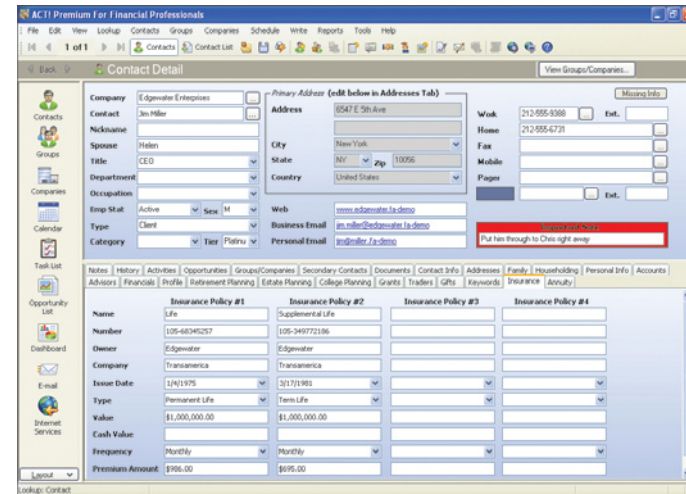


▲ List other important financial information for a contact so you can quickly review your plan of action.



▲ New for ACT! for Financial Professionals 10.0, the Insurance tab captures information on up to four policies per contact record, including Company, Issue date, Value, Cash Value, Premium, and Beneficiaries, so you gain a better understanding of your clients' liabilities and commitments.

**For more information about ACT! for Financial Professionals:**

- Individual or Small Team, Call 1-866-333-0990
- Larger Team or Sharing Data, Call 1-877-851-7571
- Contact your ACT! Certified Consultant
- Visit [www.act.com/affp](http://www.act.com/affp)

- 1 Scalability will vary based on hardware and size and usage of your database. Published minimum system requirements found at [www.act.com/2008streq](http://www.act.com/2008streq) are based on single user environments. You must purchase one license of ACT! per user.
- 2 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).
- 3 In order to edit, add, or remove Dashboard components, you must have an ACT! manager or administrator security role.
- 4 You must purchase one license of ACT! per user.
- 5 Requires Microsoft Outlook, Word, and Excel 2002, 2003, or 2007.
- 6 ACT! Business Care (which includes product upgrades, updates, and priority technical support) is an annual support and maintenance program that is renewable on the anniversary date of your purchase at the then-current renewal fee. Renewal is not required to continue to receive maintenance updates or have access to per incident technical support on a pay-per-call basis.
- 7 Product upgrades are limited to ACT! for Financial Professionals or ACT! Premium for Financial Professionals for one year from the date of purchase. Access to priority technical support is available for one year from the date of purchase. See [www.act.com/affp](http://www.act.com/affp) for more information.

**Important Note for all Customers:**

**Compatibility with ACT! Products:** ACT! for Financial Professionals 10.0 and ACT! Premium for Financial Professionals 10.0 cannot be used in conjunction with ACT! by Sage Premium 2008 (10.0) (EX or ST Edition), ACT! by Sage Premium for Web 2008 (10.0) (EX or ST Edition), and ACT! by Sage Premium for Real Estate 2008 (10.0). **Regarding ACT! Add-on Products:** Certain ACT! add-on products may not be compatible with ACT! for Financial Professionals and ACT! Premium for Financial Professionals. Please check with your add-on product provider to determine compatibility.

**About ACT!**

The #1 selling contact and customer manager for over 20 years, ACT! by Sage enables individuals and teams involved in selling or other contact-driven roles to improve productivity by helping them organize contact information, manage daily responsibilities, and communicate more effectively. With contact details at their fingertips, they can focus on what's important to their business - building stronger customer relationships. ACT! is easy to learn and use, customizable, and affordable for small businesses. With more than 2.8 million individual users and 43,000 corporate customers in 25 countries, ACT! continues to lead the industry in helping customers connect and succeed.



End-to-end solutions. Expert advice. Premium support. That's Sage 360®.

Sage Software supports the needs, challenges, and dreams of 2.7 million small and mid-sized business customers in North America through easy-to-use, scalable and customizable software and services. Sage Software is a subsidiary of The Sage Group plc, a leading international supplier of business management software and services formed in 1981 and listed on the London Stock Exchange since 1989.



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**ACT!**  
by Sage

for Financial Professionals



ACT! by Sage for Financial Professionals 10.0

Designed specifically for financial services professionals, ACT! for Financial Professionals is a comprehensive contact and compliance management solution that equips you and your team with the tools you need to enhance client retention and growth, while helping maintain corporate compliance and tracking standards. ACT! for Financial Professionals enables you to organize prospect/client data and associated financial information, maintain frequent and relevant interaction with contacts, and stay on top of activities.

ACT! for Financial Professionals also enables teams to centralize important prospect, client, and associated financial information, and share that information across team members. ACT! for Financial Professionals streamlines access to critical contact information while delivering increased data protection for the organization by capturing detailed records of all interactions.

**Capture, Centralize, and Secure Business-Critical Data**

ACT! for Financial Professionals is a single, central repository for critical prospect and client data captured across your business—whether you work alone or in a team of financial advisors (FAs)<sup>1</sup>—so detailed prospect and client information is always at your fingertips. Easily enter information that will help you understand your contacts and their investment needs, track detailed financial planning information, capture all client communications, manage prospects from inquiry to full client status, and report on overall effectiveness. Automatic data backups ensure you don't lose valuable prospect/client information, even if a financial advisor leaves your organization.

With ACT! for Financial Professionals, you can capture critical financial details for each contact, using industry-specific layouts and fields. There's a place to keep all the financial information you need to track for each client in separate, dedicated tabs, including information on the account, household, family members, advisors, estate planning, insurance and annuity records, and more. Even track the type of business, category, or tier type you have assigned and any important notes for each prospect and client on the main Contact Detail view for quick reference.

**Stay in Touch with Your Clients, Wherever You Are**

Never miss a meeting and always have the information you need when out of the office by utilizing ACT! Link for Palm OS® and ACT! Link for Pocket PC. Synchronize Contact, Calendar, and To-Do information to a handheld device, or print an ACT! calendar (including client phone number) for any scheduled call.

**MAKE CONTACT. BUILD RELATIONSHIPS. GET RESULTS.**

ACT! for Financial Professionals enables you to organize prospect/client data and associated financial information, maintain frequent and relevant interaction with contacts, and stay on top of your activities so you'll have more time to focus on retaining and growing your client base.

**KEY BENEFITS**

Capture, centralize, and secure business-critical data

Keep in touch with your clients, wherever you are

Stay on top of your schedule and tasks for razor-sharp focus

Focus on clients by using built-in processes

Improve business predictability with reporting tools

Find the right information fast for better service

Encourage client trust using quality marketing

Speed time to productivity with additional resources

## WHICH ACT! VERSION IS RIGHT FOR YOU?

In addition to ACT! for Financial Professionals 10.0, we offer ACT! by Sage Premium for Financial Professionals 10.0. ACT! for Financial Professionals is ideal for individual financial advisors, small teams of up to 10 networked users<sup>4</sup>, or large disparate workforces that don't require data sharing. ACT! Premium for Financial Professionals meets the needs of larger workgroups and teams of financial advisors<sup>1</sup>. In addition, it offers functionality such as centralized administration; advanced security features at the user and contact level; and automatic database synchronization, backup, and maintenance which facilitates administration and support for corporate administrators or IT.

### Stay on Top of Your Schedule and Tasks for Razor-Sharp Focus

The default Dashboard provided with ACT! for Financial Professionals offers a snapshot of your schedule and activities to help ensure consistent, high-quality client service.

In addition to the Dashboard's snapshot view, ACT! for Financial Professionals makes it easy for FAs to manage their calendars and activities (including recurring activities) as well as track calls, meetings, and to-dos. Activity alarms provide FAs with the tools they need to stay on top of their day, allowing them to spend more time with clients, focus on timely execution of clients' directives, and react faster to market changes.

You can also customize<sup>2</sup> the ACT! for Financial Professionals Dashboard by changing existing components or adding new ones to best suit how you and your business work<sup>3</sup>. For example, components for Opportunities and Pipeline data can be added to the default Dashboard. You can also apply filters to all Dashboard components so you can view the information based on what's most relevant to you.

### Focus on Clients by Using Built-in Processes

ACT! for Financial Professionals enables you to track and manage prospective clients from initial contact through full client status using a standard sales process or one customized<sup>2</sup> to suit your business. When working with a prospective client or on an opportunity, you can easily manage new and follow-up activities, while automatically capturing all the associated opportunity details —ensuring that prospects are appropriately managed as they move through the process. View all opportunities at once or filter by Estimated Close Date, Status, Sales Stage, or Probability of Close so you know the exact status of each prospective client.

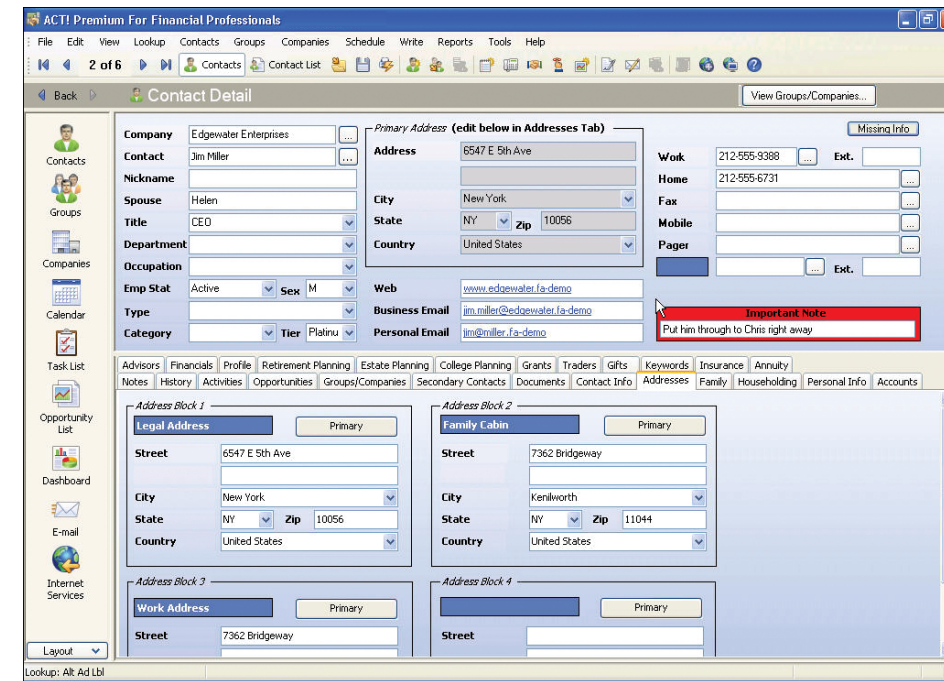
### Improve Business Predictability using Reporting Tools

With more than 40 standard reports provided in ACT! for Financial Professionals, including Contact Status, Activity Reports, History, Time Spent, and more, you have the ability to analyze your relationship status with each client and prospect so you always know where you stand. And, of these 40 reports, 20 are specifically focused on opportunities, so you can measure the revenue stream associated with each client. Not only does this help you determine your most valuable clients, but it also helps you to analyze the overall health of your business.

### Find the Right Information Fast for Better Service

ACT! for Financial Professionals provides a single, central repository for client information, so you have all relevant client information in one place, enabling you to proactively manage your client relationships.

You can access client records quickly through easy-to-do lookups by right-clicking on standard or custom fields. Or, use the Advanced Lookup function to easily perform lookups and searches for information specific to a particular client.



▲ You can easily and quickly classify one address as primary based on the location of your client at a given time. Simply promote the address you want to serve as primary using the Primary button above the corresponding address.

### Encourage Client Trust with Quality Marketing

Increase the frequency of quality client “touches” with custom campaigns or even birthday wishes. ACT! for Financial Professionals allows you to personalize communications to clients and prospects using standard and custom templates for formal letters, e-mails, proposals, and marketing communication. Integrate with Microsoft® Outlook® and Word® to make the process even easier.

The Primary Address button lets you indicate which address should be used in a particular template to ensure your communications reach the recipient. Keep up to four addresses on hand for each contact and label each as work, home, vacation home, or whatever category you choose.

The primary address will appear as such on the main Contact Detail view, eliminating the need for manual entry and ensuring you have the most up-to-date information for sending timely communications. Addresses classified as primary are used by all form and layout templates.

ACT! for Financial Professionals allows you to communicate with all of your critical prospects and clients, and keep a record of each sent communication on the contact record for quick and easy referencing. This keeps you organized and helps you with regulatory compliance.

## SPEED TIME TO PRODUCTIVITY WITH ADDITIONAL RESOURCES

Your purchase of ACT! for Financial Professionals 10.0 includes ACT! Business Care<sup>6</sup>, a support and maintenance plan which provides you with product upgrades<sup>7</sup> and updates as well as priority access to senior technical support specialists, all to ensure that you have the best possible user experience. For complete information about the ACT! Business Care plan and its benefits, visit [www.act.com/support/plans/bc](http://www.act.com/support/plans/bc).

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