

Benefits of Using



Broker's Ally™ V9
CLIENT AND PORTFOLIO MANAGEMENT

We help advisors be successful in the world's greatest business; helping people grow their money, save on taxes, and plan for retirement! Here are some benefits derived from implementing the Broker's Ally productivity and client relationship management (CRM) system:

- 1. Extend Longevity of Relationship-** Capturing detailed client and prospect information will help to secure a positive client relationship for a longer period of time.
- 2. Enhance other offerings and cross selling-** Use of Broker's Ally helps to increase penetration of all products being offered.
- 3. Compliance Satisfaction-** Supports consistent, targeted and measurable behavior of account representatives and their assistants with note taking and audit trail reporting.
- 4. Increase Productivity and Sales Revenue-** Helps to support more productivity and efficiency in all daily operations.
- 5. Better Trained and controlled Teams-** Helps to ensure all representatives and assistants work in a well-defined path following their strategic plan.
- 6. Increase Assets Under Management-** Helps to uncover hidden assets by the use of structured data gathering and client questioning and profiling.
- 7. Open More Accounts-** Helps to increase sales pipeline conversions from status of lead, to a qualified prospect, then on through to the client status.
- 8. Do More Trades-** Helps to enable reps to "always have a reason to call" by profiling customers and target marketing appropriate products to appropriate clients.

Jss/Winword/ba/ba9/Benefits

"I've installed the new Broker's Ally version 9 and it's bigger and a lot easier to read. I really appreciated all the help and support! This will make my business more efficient and productive." Mark Gardner, Managing Director, Bear Stearns, Dallas, Private Client Services

"My life is wrapped around Broker's Ally v9. I was pleased with the Quick Start Guide that came with the v9 upgrade to help the installation go flawlessly, it worked like a charm. I have a boat in the Mediterranean that I go to each year; without Broker's Ally I would never be able to go. I LOVE BROKER'S ALLY and have used it daily since 1989!" Michael Grinnell, Partner, Wiswell & Neff Financial & Advisory Services Raymond James, Stuart, FL



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