

TECHNOLOGY RECOMMENDATIONS



Pershing's revolutionary platform provides the tools needed to manage and trade your clients' accounts, deliver first-rate service and develop new sales and revenue opportunities. Learn about [Pershing's Digital Experience](#) and [download](#) the NetX360 desktop application. **Contact:** Amy Howell – ahowell@capital-invest.com



Albridge Wealth Reporting seamless single sign on from Pershing's Netx360 enables you to consolidate client account data from hundreds of diverse sources: proprietary fees, banking, brokerage, insurance, retirement, managed accounts, alternatives and trusts. It quickly produces and distributes consolidated client performance reports, asset allocation, holdings, transactions, benchmarking, cost basis and client access. **Contact:** Robin VanBurik – rvanburik@capital-invest.com **COST (Netx & Albridge) \$150.00 monthly**



Access to Hundreds of Pre-Approved Professionally Authored Marketing Messages. Seamless Integration with the Redtail CRM. **Peter Montoya Inc.** is the leader in marketing automation for Financial Professionals – providing an online library of thousands of professionally written marketing materials, compliance interaction for pre-review of materials, automated campaigns, email, direct mail and more. **Go To:** www.marketinglibrary.net and select the **Subscribe** tab. **COST: \$10.00 monthly**



Client Relationship Management (CRM) with Integration to Pershing Netx360 and Albridge. Redtail is a web-based, easy-to-use client management solution designed specifically for Financial Professionals. It features Online Calendaring and Task Management, Low Cost of Ownership and Complimentary Database Conversions. **Contact:** 1-800-206-5030 **Option 2** **COST: \$60 monthly for one advisor with up to 15 administrative logins**



Internet-Based Financial Planning Software. Data Integration with Redtail CRM. Its unique client-centered approach supports a sophisticated, goal-oriented planning process that is more meaningful to the client and more productive for the advisor. It contains a number of capabilities not often found at this price, as well as the ability to collaborate with your client and your client's other advisors over the Web. **Contact:** Tom Roberts - tom@moneyguidepro.com or 800-8415312 **COST: \$995 Annually thru Pershing affiliation**



Use Your Existing Client Data to Automatically Populate Forms. **Laser App** is the premier e-forms provider in the financial services industry. Laser App creates highly integrated solutions that combine state-of-the-art forms-filling technology with its massive library of industry related forms. Financial forms are filled instantly and with consistency, reducing the redundancy of data entry. **Contact:** Tess Ramby - tramby@capital-invest.com **COST: \$37.00 monthly**



Use Your Existing Client Data to Automatically Populate Forms. Professional individuals rely on the "Quik! Transaction Manager" software both online and offline to prefill forms with their client data from our vast [library of financial forms](#). Quik! seamlessly connects to Albridge and Redtail. **Contact:** support@quikforms.com **COST: \$25.00 monthly**



The Back Room Technician — The ONLY software program that combines fast easy needs analysis with persuasive client education and presentation tools in a single interface. Included to motivate your clients and prospects are over 600 Educational Reports / Graphics / Charts; 60 simple input calculators and 11 needs analysis for topics such as Retirement, Life Insurance, Business Continuation, College Funding, Personal Finance, Asset Allocation, Long Term Care, Disability, Accumulation Funding, Estates & Trusts and Charitable. [Click here for more information.](#) **Contact:** <http://www.brtnow.com> **COST: Free Trial Available – Starting at \$399 Package Prices Vary**



A fully compliant CRM integrated SMS texting platform for a Bring Your Own Device environment. Investment professionals may now compliantly communicate with their clients via text messaging. **Contact:** www.MyRepChat.com 844-402-CHAT **Sign Up:** **COST: \$12.00 monthly**



Get documents securely signed online anytime, anywhere on any device. Seamless integration with LaserApp, Quik, and Pershing's Netx360 **Contact:** Amy Howell – ahowell@capital-invest.com **Go To:** www.signix.com **COST: \$20.00 monthly**