



# Broker's Helper Advanced

## Product Description:

Broker's Helper Advanced is an advanced weapon for the aggressive advisor. It takes the portfolio management and customer relationship management of our Basic platform, and amplifies it with graphing, custom portfolio reports, and an array of advanced reporting features. Targeted sales campaigns and beefed-up client contact are just a few keystrokes away, and great-looking account reports are effortless.

## Who is it for?:

Advisors who choose Broker's Helper Advanced are often established in their careers, but looking for a secret weapon to help them outpace their competition. The product helps the advisor automate most of the job, which opens up time for attracting new assets.

## Sales Features:

Available in Broker's Helper Basic and Advanced.

- Datebook and address book hotsync with **Palm OS** devices
- Ability to email clients directly from contact screen, eliminating the need to toggle between programs
- Sales lists for organizing clients by assets, location, holdings, or any other search criteria
- Ability to merge contact information with **MS Office** files
- Customizable fields for clients' personal and financial information
- Speed-dial
- History log -from a single screen, records of every contact ever had with a client.
- Target-marketing tools
- Two-letter search for ultra-fast retrieval of records

## Portfolio Features:

Available exclusively in Broker's Helper Advanced\*

- Time-weighted performance reporting
- "What if" capabilities
- Customized portfolio reports

## Portfolio Features:

Available in all Broker's Helper Programs.

- Full AIMR compliance in all reports
- Full color graphics
- Easy householding of accounts, with instant access to Audit Trail
- Downloads of prices, transactions and account information from many wirehouses
- Product management
- 22 Transaction types

## Reports:

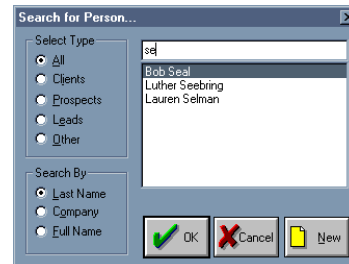
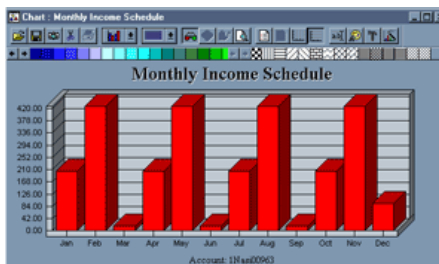
Available exclusively in Broker's Helper Advanced.\*

- Customized reports for individual client requests
- Performance Summary: Net of Fees, Gross of Fees

## Reports:

Available in Broker's Helper Basic and Advanced.

- Gain/Loss with Dividend Reinvestment
- Realized Gains and Losses
- Asset Distribution
- Monthly Income Schedule
- many more



## System Requirements:

Minimum: Pentium 133 MHz or higher; 64 MB RAM; 500 MB hard drive (storage) space; ability to read CD-ROMs; Win 95/98/2000/NT

## Price:

\$1000 for the first year; \$250 maintenance charge each following year.  
Additional network stations: \$500 first year, \$125 each following year.  
Annual maintenance includes software upgrades and full phone/online technical support.

\* all Portfolio Features and Reports in Broker's Helper Advanced are also featured in our flagship program for money managers, Investment Advisor's Helper.