Save Time with Firm-Customized Correspondence Templates

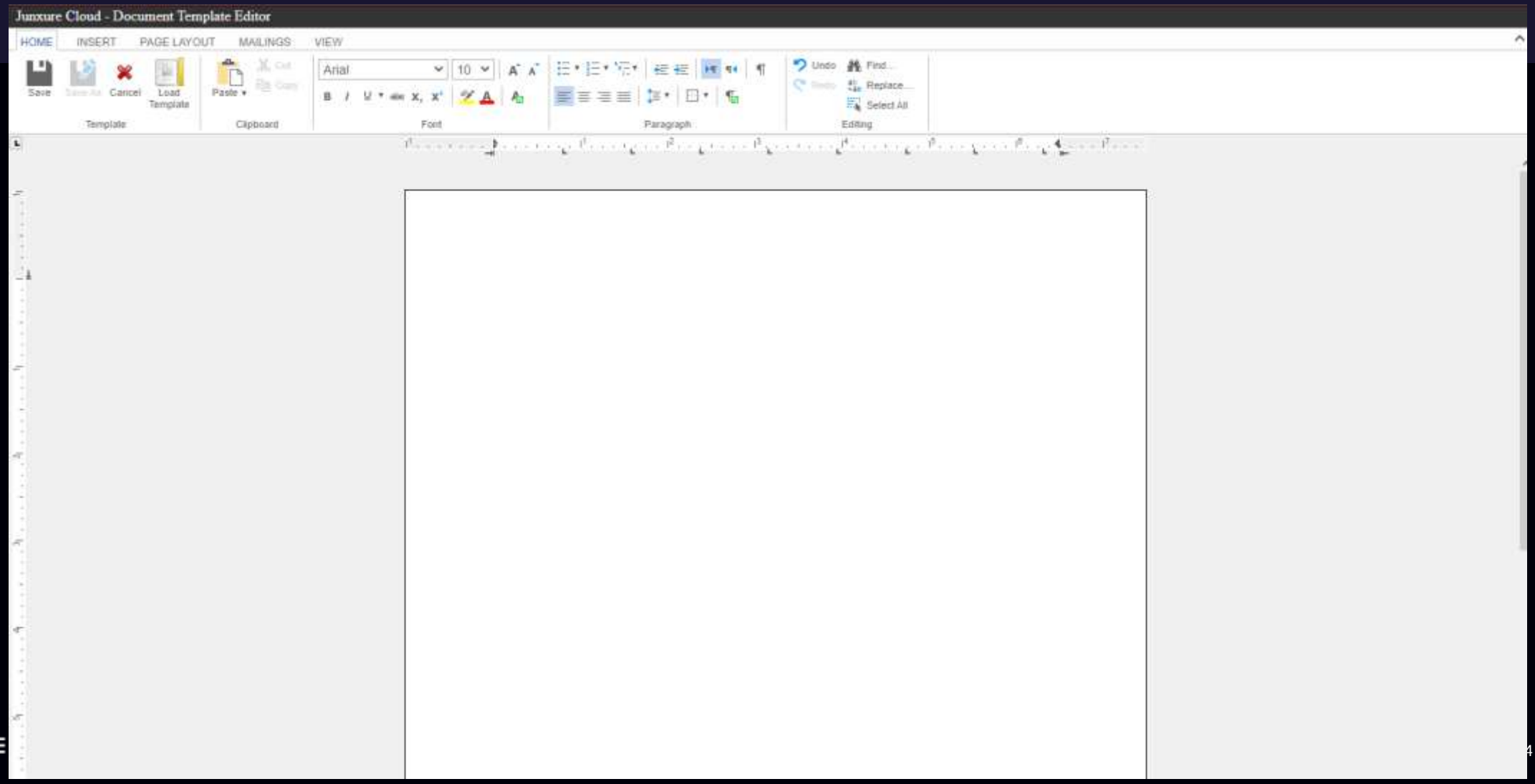
Presented by: Billy Rueckert
Training & Consulting Team

AdvisorEngine

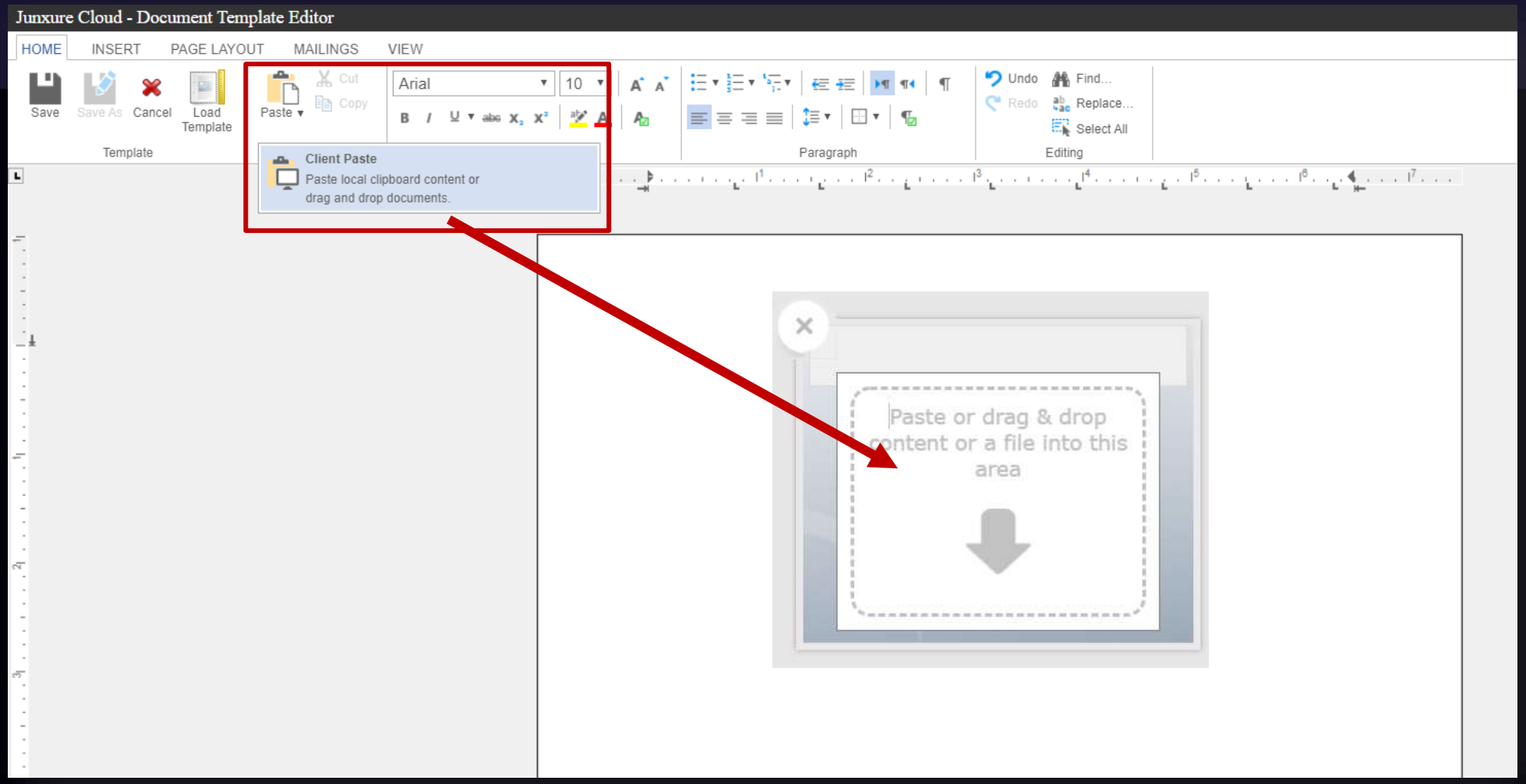
Today’s Agenda:

- ✓ Document Templates
- ✓ Email Templates
  - ✓ Using Exchange
  - ✓ Using M365
- ✓ Correspondence

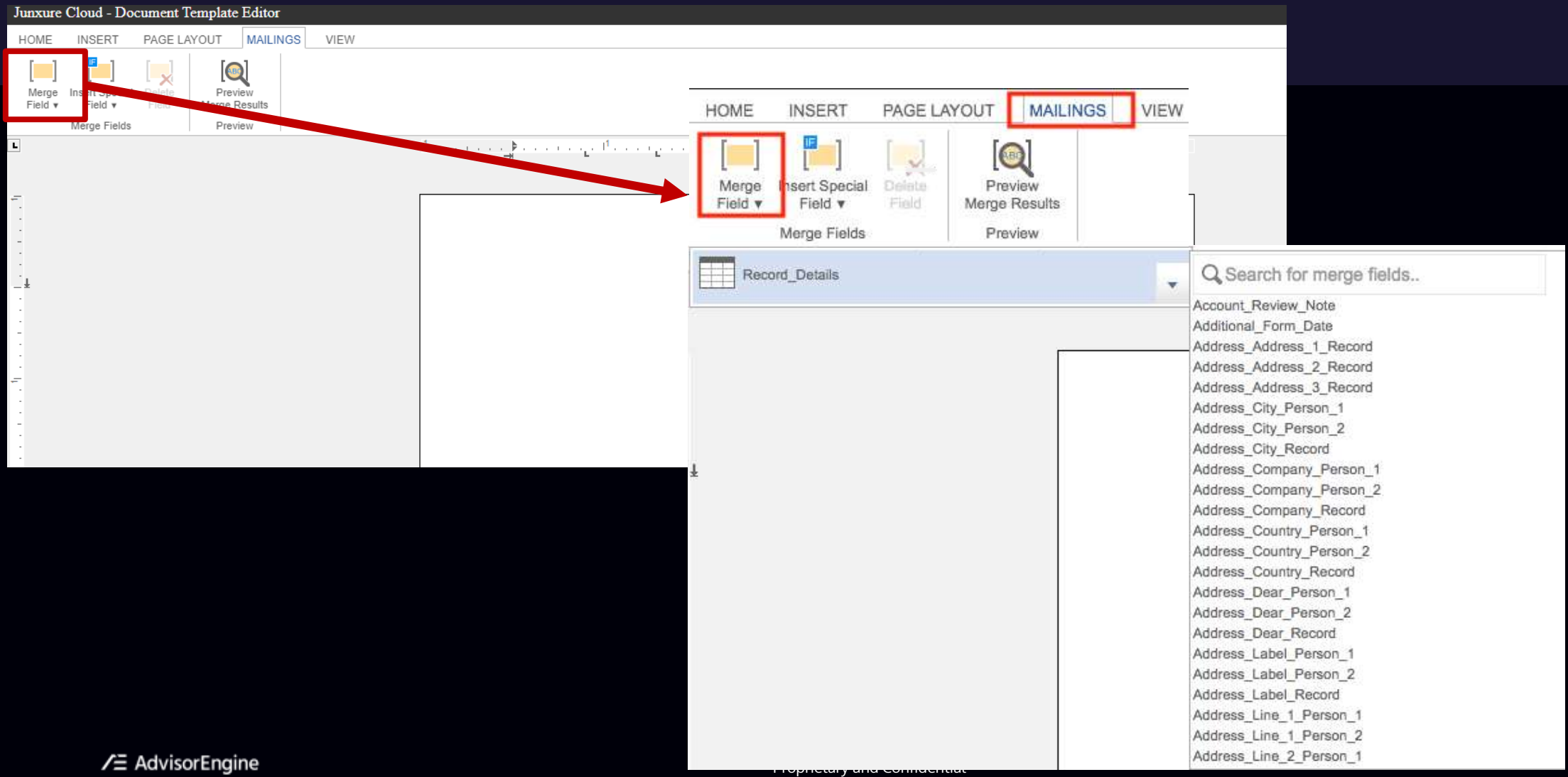
Using the Correspondence Editor



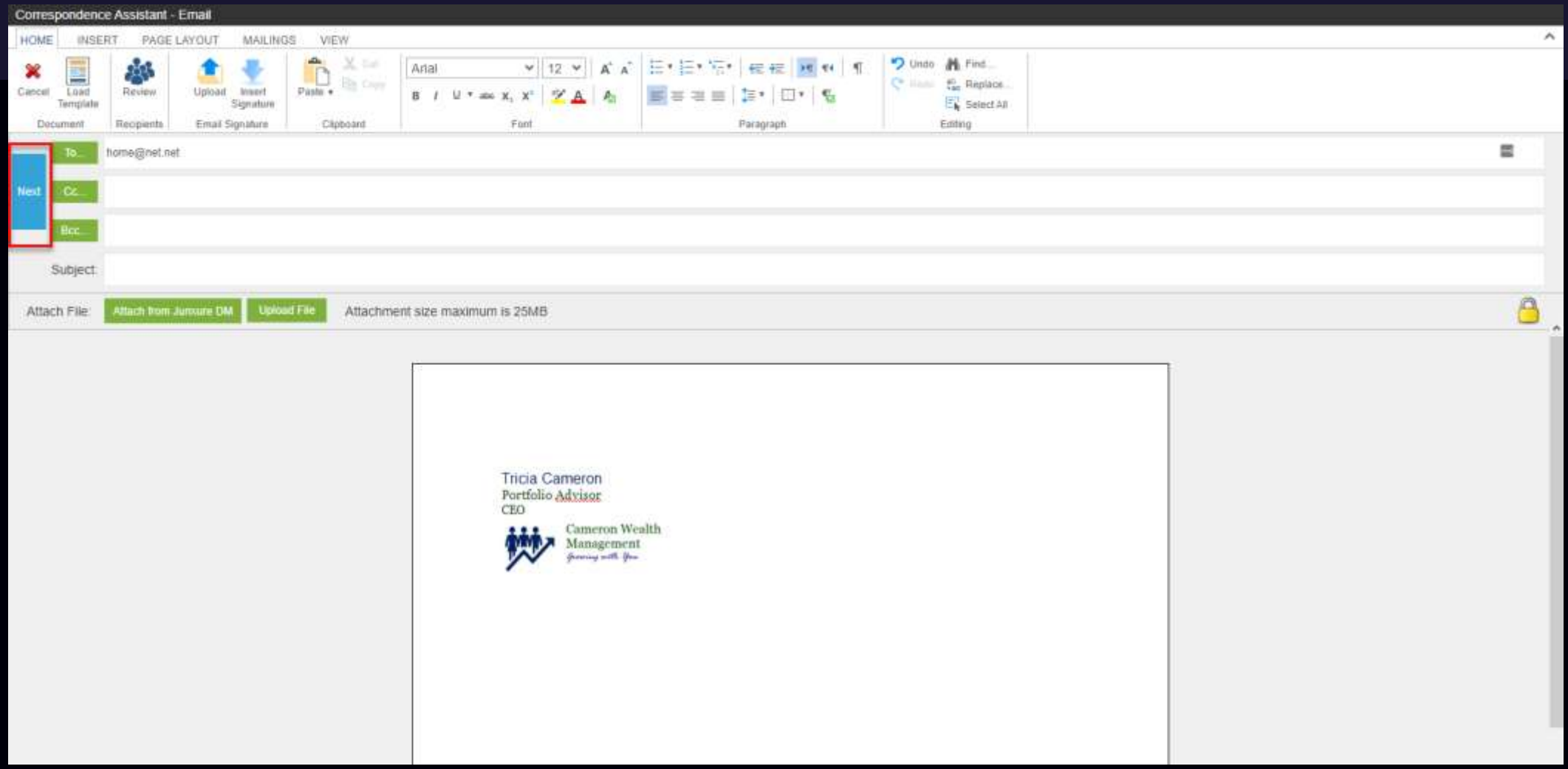
Paste Function is Different



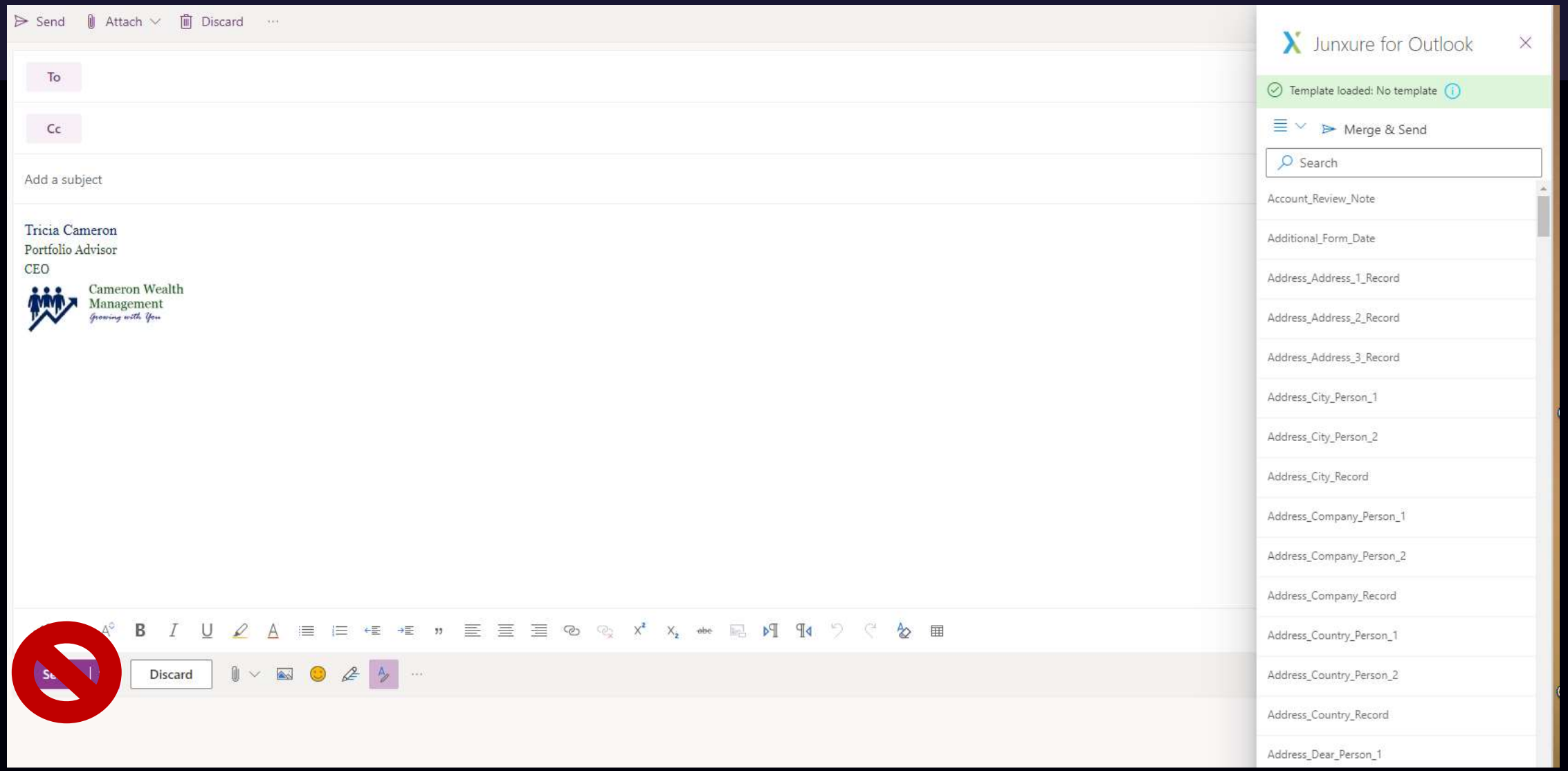
Use Merge Fields



Sending Email from Junxure/Exchange



Sending Email from Junxure w/Microsoft 365



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THANK YOU

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