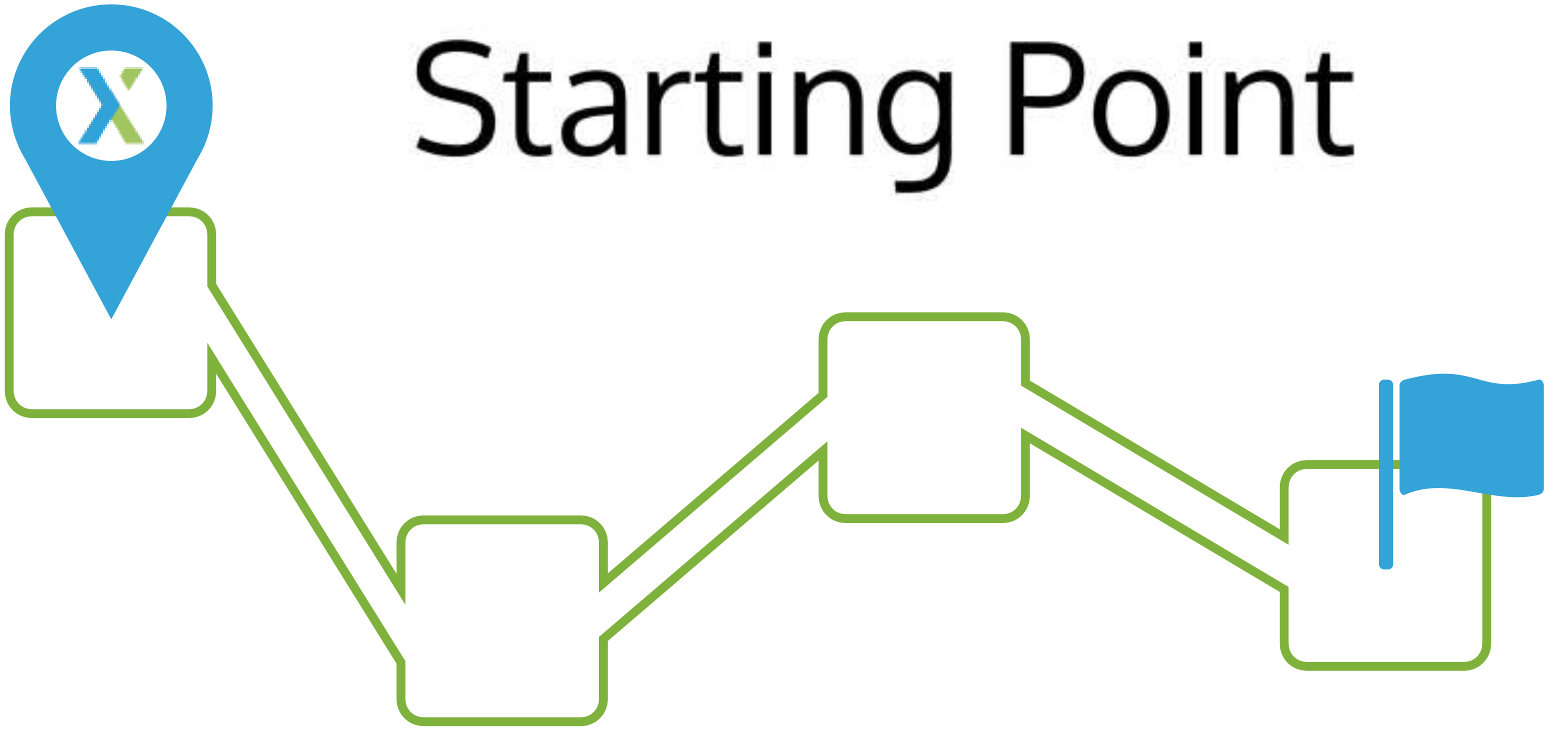
Session 8
Possibilities: Power User Features and Q&A



Today's Topics

- Time for Q & A
- Importance of consistency
  - Tools that help!
- Integrations
- System Security suggestions
- A word about Workflow
- Grid Views
- Client Service tools
- Learning does not stop here!

Suggested Record Templates

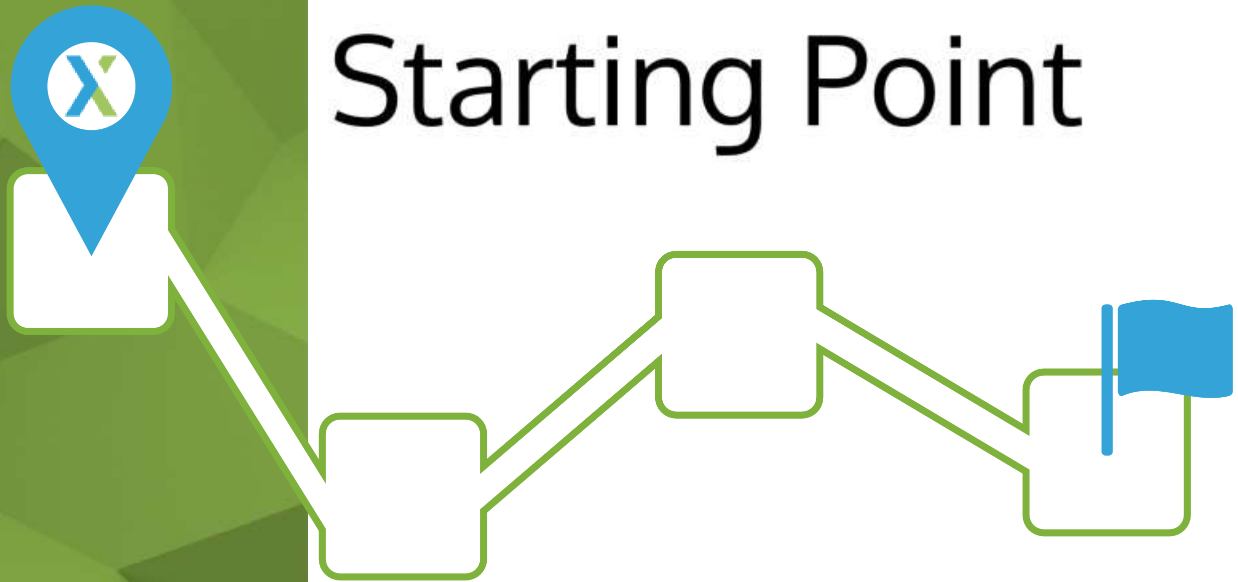
By Advisor	By CSR
Data Check	Contact Info
Compliance Related	AUM Based
Default Office View	Notice Filing
Referrals	Suitability

Suggested Action Templates

Date Entered	Pending Actions - All
Pending Actions – Assigned to	Pending Actions – Per Client
Pending Actions – By Advisor	Compliance Based
Print View	By Category
By Type	Firm Default

Think outside the box!

My Pending Actions – By Priority	My Pending Actions – By Start Date
Alerts – Action Assigned	Alerts – FYI's
Assets – By Asset Type	Assets – By Financial Account Type
Record Actions - Pending	Record Actions – By Type
Record Actions – Last meeting (based on the 'type' of meeting)	Advanced Searches – By Type of Category



Congratulations on finishing this series!

Next Steps:

On-Going Education Classes!