DATASHEET

Financial Advisors Information Package

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MAXIMIZER CRM
for Financial Advisors

HELPING FINANCIAL ADVISORS SUCCEED

A POWERFUL CRM SOLUTION TO HELP INVESTMENT ADVISORS MANAGE CLIENT RELATIONS, BUILD BOOK OF BUSINESS VALUE AND STREAMLINE THEIR PRACTICE. MAXIMIZER CRM FOR FINANCIAL ADVISORS IS A HIGHLY SECURE AND EASILY CUSTOMIZED SOLUTION BUILT SPECIFICALLY FOR MAXIMIZER CRM FOR FINANCIAL SERVICES.

CLIENT INFO AT YOUR FINGERTIPS

Maximize the value of your book of business by keeping client information in one central location. With all client documentation and history available in Maximizer CRM it's easy to gain insight into clients' interests and investment preferences in order to offer services tailored to individual needs. Additionally, stay connected to clients when out of the office with mobile access.

STREAMLINE COMMON PRACTICES

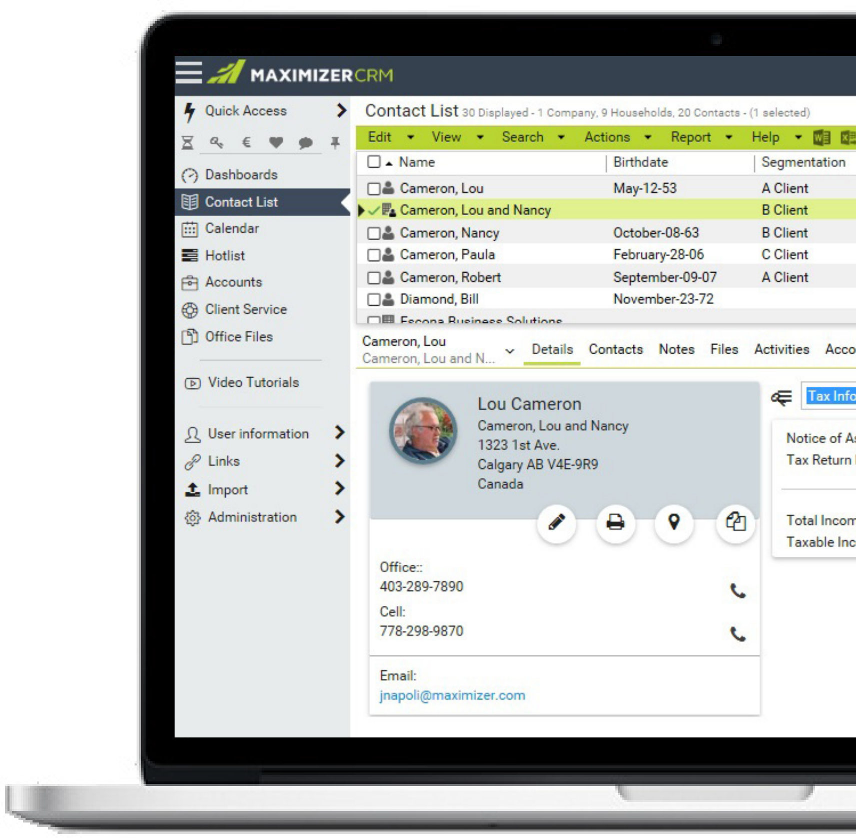
By eliminating time consuming administration it becomes easier to focus on meaningful client engagements. Maximizer can automatically manage repeatable, standard practices like client onboarding, trade recommendations, and client acquisition to ensure consistency with customer interactions and adherence to regulatory requirements.

MONITOR METRICS AND TRACK PROGRESS

Built-in dashboards and reports show performance metrics crucial to any Financial Advisor firm in real-time and may be further customized to meet the needs of individual advisors and management.
The same technology that powers these reports can also be used to quickly identify clients that meet a predetermined set of criteria such as acceptable risk levels or minimum asset base.

THE SHIFT TO FINANCIAL ADVISOR CRM

A large number of successful investment advisors, Financial Advisory firms and national banks have been long-time proponents of using Maximizer CRM to manage and grow their businesses. To keep up with a constantly changing industry while maintaining high levels of client service, successful investment advisors are turning to industry specific technology.



FINANCIAL ADVISOR EDITION HIGHLIGHTS

A COMPLETE SOLUTION TO EASILY MANAGE CLIENTS, STREAMLINE COMPLEX PROCESSES AND HELP YOU GROW.

KNOW YOUR CLIENT WORKFLOW
Ensure regulatory compliance with mandatory data entry and follow-up requirements.

TEAM COLLABORATION
Each team member has a shared view of all updates, activities, calendars and assignments to ensure comprehensive client management.

SECURE DEPLOYMENT
Store your data on-premise or in the cloud, whichever you prefer.

'ONE VIEW' CLIENT PROFILE
View key information immediately within one clear client profile.

MOBILE CRM
Keep connected to clients when out of the office with secure access via smartphones or tablets.

BUSINESS INTELLIGENCE
Customize dashboard views to meet the needs of individual advisors, business units and management.

5 REASONS TO MOVE TO FINANCIAL ADVISORS CRM

1 IN-DEPTH CLIENT PROFILES
Financial Advisors CRM shows a complete client profile and KYC information, allowing advisors to quickly and accurately respond to inquiries. This complete view also allows for clients to easily be segmented, identifying revenue opportunities.

2 SUCCESSION PLANNING
A book of business logged in a CRM database is much more valuable than a mere log of contacts with some notes attached in Outlook/Excel.

3 PROVIDE SUPERIOR CLIENT SERVICE
The Clients will only continue to demand higher levels of service. With Financial Advisor CRM you'll be able to easily handle these growing expectations.

4 MONITORING METRICS THAT MATTER
Maximizer CRM for Financial Advisors has been preconfigured with dashboards and reports to help measure performance across individual advisors and the entire organization.

5 STREAMLINE WORKFLOW AUTOMATION
Workflow automation allows for automatic management of repeatable actions, eliminating time consuming processes that are frequently administrative in nature.

"A BIG REASON WHY WE CHOSE MAXIMIZER IS BECAUSE THE TOOL IS FLEXIBLE AND INTEGRATED WELL WITH OUR BACK-OFFICE ARCHITECTURE. DATA IS ABLE TO BE TRANSFERRED AUTOMATICALLY BETWEEN THE TWO APPLICATIONS."

Sterling Mutuals

"TO BECOME AND STAY COMPETITIVE, ADVISORS REALLY NEED A SOPHISTICATED CUSTOMER RELATIONSHIP MANAGEMENT (CRM) SOLUTION."

HollisWealth

"WE DID A HEAD-TO-HEAD COMPARISON BETWEEN MAXIMIZER AND OTHER CRM PROVIDERS. MAXIMIZER WAS THE CLEAR WINNER FOR EASE OF USE AND BEING VERY USER FRIENDLY."

Clients Edge Group

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1-800-804-6299

MAXIMIZER CRM IS USED FOR:

STERLING MUTUALS INC.

HollisWealth

RAYMOND JAMES

RICHARDSON GMP

ABOUT MAXIMIZER

MAXIMIZER CRM IS FUELING THE GROWTH OF BUSINESSES AROUND THE WORLD.

Our CRM solutions come fully loaded with the core Sales, Marketing and Service functionality companies need to optimize sales productivity, accelerate marketing and improve customer service. With flexible on-premise, our cloud and your cloud deployment options, tailored-to-fit flexibility, state-of-the art security infrastructure, industry-specific editions and anywhere/ anytime mobile access, Maximizer is the affordable CRM solution of choice.

From offices in North America, Europe, Middle East, Africa and AsiaPac, and a worldwide network of certified business partners, Maximizer has shipped over one million licenses to more than 120,000 customers worldwide.

MAXIMIZER CRM

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