

Financial Services

Highlights

- Award-winning sales & contact management, time management and communications used by top financial firms and professionals including financial advisors, brokers and agents
- Includes Financial Services templates
- Integration with Microsoft® Office® & Outlook®, your mobile smartphone and QuickBooks® accounting software
- Synchronization with mobile smartphones
- Task Management & Action Planner
- Document & Communications Management
- Email Marketing
- Reporting with Crystal Reports®
- Group access and security with Windows Desktop or Web Access¹

Offer Exceptional Service. Increase Client Loyalty. Accelerate Business Growth.

In today's economy, financial markets are unpredictable and portfolio performance is difficult to control. What is within your control is building satisfied, loyal client relationships, resulting in long-term book value and success. With over one million licenses sold, many to clients in some of the world's leading financial services firms, Maximizer™ CRM software enables financial services professionals to succeed by effectively managing client relationships, processes and time. With Maximizer CRM you can focus on delivering exceptional service that will attract new clients and build customer loyalty.

Financial Services Tools & Templates

Get up and running quickly with built-in templates & tools designed for busy financial services professionals.

- Apply the financial services template to your database to maximize productivity, time and client focus.
- Use built-in document templates to keep clients informed and aware of important steps in investment planning, Wills & Estate preparation, financial management, and more.
- Communicate effectively with clients and prospects using a variety of Microsoft Word® letter and fax templates such as "Event Invitation" for financial planning seminars and workshops, "Welcome New Client", "Quarterly Reports", "Newsletter" for economic outlooks, market forecasts and investment updates.

Client Management

Manage your client and prospect relationships effectively to increase your client base and build loyalty.

- Manage an unlimited number of clients and prospects, profiled with pre-set fields or with fields that you create based on your preferred criteria and terminology.
- Effectively track and profile your clients so you can focus on high-value business with pre-set fields such as "Net Worth," "Investment Style, Goals or Knowledge", "Assets", "Beneficiaries" and more.
- Add individual prospects or import groups of prospects from your marketing events and activities, using Excel® spreadsheets or other standard formats.
- Easily create custom views with key data entry fields to see critical information for your business.
- Create one-click access to frequently accessed customer or prospect lists based on any search field(s) to better target your marketing.
- Keep your lists clean with duplicate record checking and mandatory fields.
- Keep track of who is on the "Do Not Call" registry to ensure you comply.



Mobile CRM: Get real-time online access to entire Maximizer CRM database and content.

Mobile Access to Client Information

With MaxMobile² for BlackBerry[®] you can access and update client information, notes, tasks and appointments on your smartphone — anytime, anywhere.

- Deploy MaxMobile on your staff's BlackBerry[®] smartphones quickly and easily, for a seamless start.
- Get real-time online access to entire Maximizer CRM database content.
- Enable collaboration among team members on the road to set up multi-user appointments and assign tasks.
- Integrate with your BlackBerry's built-in address book, email and phone to immediately create new records, opportunities, cases, appointments, tasks and notes within Maximizer CRM and vice-versa.
- Receive and send automatic email notifications for appointments and task assignments.
- Get one-click access to maps and directions from client records.
- Plan your optimal day of appointments and activities by mapping multiple customers to your BlackBerry GPS to get turn-by-turn directions.³
- Improve productivity on the road by viewing, creating and editing new documents on your BlackBerry.
- For a list of supported devices, please visit:
<http://www.maximizer.com/supported-products/handheld.html>

Task Management & Action Planner

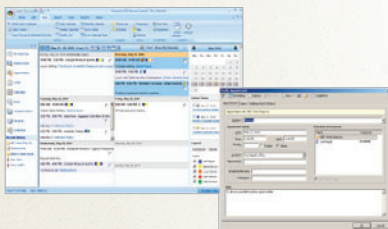
Manage tasks to make it easier than ever to stay on track.

- Create one action plan comprised of a series of required tasks and appointments to stay focused on delivering a consistent client experience.
- Manage day-to-day processes with pre-configured action plans as "Service Plan", "Account Management Plan" or "Creating & Publishing Knowledge-Based Articles."
- Assign tasks to yourself, assistants or colleagues to ensure that critical tasks and requirements are met for each transaction.
- View all upcoming tasks at a glance for any given client.

Time Management

Effectively manage your busy schedule and ensure nothing slips through the cracks.

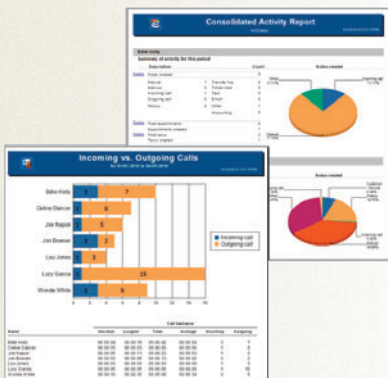
- View appointments for the day, week or month at a glance, with direct links to the contact record.
- Prioritize activities and set up reminders or alarms to prompt you about deadlines and appointments.
- Collaborate seamlessly with your team, enabling your assistant to book appointments or view your colleagues' schedules at a glance.
- Choose daily, weekly or monthly views for your calendar and print to your daytimer.
- Track and report time spent by product to monitor which funds, insurance packages, or mortgage products are being marketed to clients.
- Stay on top of appointments while on the road by synchronizing your calendar with your mobile device.
- Get one-click access to maps & directions for properties using the built-in Microsoft[®] mapping tool.



Color-Coded Multi-User Calendar: View upcoming appointments and prioritized activities at a glance.

" My clients expect first class service, and Maximizer gives my team the tools to deliver. Maximizer allows us to manage the financial affairs of our clients effectively, streamline administrative tasks, systematize routine business functions, and customize our service offering. This frees us up to focus our efforts on providing our clients with quality financial advice and exceptional service."

Dave Lee, FMA, CFP, CSWP
Wealth Advisor
ScotiaMcLeod



Instant Reporting: Quickly create reports and export to Excel® with one click for easy sharing and further analysis.

Communications with Microsoft Office® & Outlook® Integration

Communicate easily and more effectively with seamless Microsoft integration.

- Create your own or use built-in templates to send letters, faxes, and emails with ease.
- Save all communications, account information, fund reports and investment profile to relevant records to build a 360-degree view of your client.
- Use Microsoft Word or Maximizer's built-in word processor for your communications.
- Personalize your communications by merging fields from client records into letters, proposals, envelopes, labels and more.
- Keep your schedule and contact information up-to-date with two-way synchronization between Maximizer & Microsoft Outlook.
- View Outlook® messages within Maximizer and save important emails to client records.
- Import or export contacts between Maximizer and Outlook.

Document Management

Manage and gain quick access to your electronic documents.

- Centralize your electronic documents including economic forecasts, market reports, investment profiles, and contracts for easy access.
- Access and email documents directly from Maximizer's Company Library.
- Stay organized with custom folders and convenient document preview.
- Store personalized documents against client records for easy retrieval.
- Keep your documents in existing formats including Word®, WordPerfect®, Excel®, PowerPoint®, Acrobat Reader and other standard programs.

On-the-Fly Reporting

Instantly produce reports to view a snapshot of your business.

- Produce comprehensive real-time reports enhanced with corresponding graphics and publish in your choice of formats including PDF, HTML, or RTF.
- Over 100 pre-built reports in Maximizer, including task lists, account activities, phone logs and sales pipeline.
- Includes Crystal Reports® templates - the world's industry standard reporting format.
- Export data lists to Excel® with one click for further analysis in a familiar environment.

Use Alone or in a Group⁴

Easily network with colleagues or your assistant with Maximizer CRM.

- With several editions to choose from, use Maximizer CRM to keep a standalone database of your clients, shared with your small office of assistants and associates or with a large nationwide group.
- Enable distinct rights for viewing, transferring, importing, and exporting data to protect your client information.
- Convert embedded documents to link outside Maximizer to reduce database size.
- Apply read-only or full access to lists, search catalogs, and views so you can share or keep your information private.
- Select from Windows desktop, Web Access¹ and/or mobile CRM² options to access information from any location, at any time.

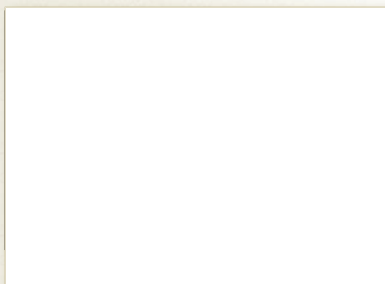
Maximizer CRM 11 Features

- Account and contact management
- Time management
- Task management and automation
- Sales force automation
- Sales forecasting
- Marketing automation
- Email marketing
- Customer service management
- Microsoft Office integration
- Outlook & Exchange synchronization
- Accounting integration
- Business Intelligence
- Workflow automation
- Partner relationship management
- Access options: mobile devices, web, Windows desktop, remote synchronization

Technology Partners



Certified Solution Provider



Integrate with QuickBooks®

View your customers' accounting information through one simple interface.

- View your customers' accounting information directly from Maximizer CRM.
- Create new Address Book entries from an existing accounting database.
- Search for transactions by number, including invoices, quotes/estimates and purchase orders.
- See the status of credit limit and balance details.
- For a complete list of supported versions of QuickBooks®, please visit www.maximizer.com/supported-products/index.html

Customize and Integrate with Existing Systems⁵

Personalize Maximizer CRM to your unique processes.

- Easily configure Maximizer CRM fields, personal views and security to match to your business processes and way of working.
- Use the Customization Suite for more advanced customization, such as custom windows and forms.
- Integrate your client data in Maximizer CRM with data in other back-end applications such as wealth management and financial planning software to ensure data integrity and seamless client experience.

Contact Maximizer Software to learn how you can mobilize your workforce with Maximizer CRM 11 All Access.

1. Web Access available with Group and Enterprise Editions only.
2. MaxMobile for BlackBerry® is included with Enterprise, Group & Team Edition. MaxMobile is an add-on product for Entrepreneur Edition with additional license fees. MaxMobile requires wireless server hardware and Microsoft® Internet Information Services (IIS). MaxMobile Wireless Server is included with Maximizer CRM 11 All Access licenses which are available with Group & Enterprise editions.
3. For BlackBerry devices running BlackBerry OS 4.7 and later only, options to display multiple addresses, as well as driving directions between two locations is supported. For BlackBerry devices running BlackBerry OS 4.2.1 to 4.6, only BlackBerry Map is supported, driving directions are not available.
4. Networking with multiple users/colleagues requires additional licenses and a workgroup license available from Maximizer Software (up to 10 users).
5. Customization and Integration requires Maximizer CRM Customization Suite (add-on with additional license fees), available only with Group, Professional, and Enterprise Editions. Also requires knowledge and skills in software development, or work with Maximizer Software Professional Services, or a Maximizer Certified Partner.

Why Maximizer CRM 11?

1. **Simple & quick** to deploy, learn, use and maintain
2. **Access options** through the Web, desktop and mobile smartphones
3. **Value.** Best value for a full-featured CRM, low total cost of ownership.
4. **Expertise.** More than 20 years as a pioneer and leader in CRM.

Visit www.maximizer.com for:

- Information based on your role: sales, marketing, service, executive, IT
- Information on CRM and Contact Management
- An overview of features and technology
- Online demos and free trial software
- White papers and webinars on CRM best practices.

Maximizer CRM helps small and medium-sized businesses maximize sales, customer satisfaction and profitability through increased business productivity and optimization of limited resources.

Maximizer Software
Simply Successful CRM

Call: **1-800-804-6299**

Email: sales@maximizer.com

Web: www.maximizer.com

Americas
604-601-8000 PH
604-601-8001 FAX

info@maximizer.com
www.maximizer.com

Europe, Middle East
+44 (0) 845 555 99 55 PH
+44 (0) 845 555 99 66 FAX

info@max.co.uk
www.max.co.uk

Australia, New Zealand
+61 (0) 2 9957 2011 PH
+61 (0) 2 9957 2711 FAX

info@maximizer.com.au
www.maximizer.com.au

Asia
+(852) 2598 2888 PH
+(852) 2598 2000 FAX

info@maximizer.com.hk
www.maximizer.com.hk
www.maximizer.com.cn