

PLAN COMPARISON

	Agent/Advisor \$99.95/mo. One-Time Activation Fee \$150	Recruiting \$139.95/mo. One-Time Activation Fee \$150	Wealth Advisor \$69.95/mo. One-Time Activation Fee \$150
16 Digital Marketing Modules	●	●	
Automated Yearly Campaigns	●	●	●
Manual Mailings	●	●	
Up to 3500 Contacts	●	●	●
Unlimited Mailings	●	●	
Contact Grabber	●	●	●
Automatic & Manual Contact Imports	●	●	●
Seamless Integrations (Salesforce, Redtail, SmartOffice, Gmail, Yahoo, Office 365)	●	●	●
Unlimited Groups	●	●	●
e-Storyboards	●	●	●
e-Checklists	●	●	●
e-Cards	●	●	●
e-Newsletters	●	●	
e-Inspirational Messages	●	●	
e-Postcards	●	●	
e-Photo Album	●	●	
e-Articles	●	●	
HTML Builder	●	●	
e-Videos	●	●	
Social Media Marketing	●	●	
e-Referral Module	●	●	
e-Seminar Invites	●	●	
CRM (Customer Relationship Management) LITE	●	●	●
Responsive Email Designs	●	●	●
Lead Generation Content Library	●	●	●
Weekly Market Commentary	●	●	●
Birthday & Holiday Campaigns	●	●	●
Yearly Automated Campaign Content Refresh	●	●	●
Multimedia Content	●	●	●
Custom Email & Email Library	●	●	●
Custom Signature Enhancements with Social Media Tags	●	●	●
SEC Archiving Compliant Journaling	●	●	●
Advanced History & Analytics	●	●	●
Recruiting e-Storyboards		●	
Recruiting e-Newsletters		●	
Recruiting e-Articles		●	
P200 Coaching Module		●	
P200 Market Evaluator Module		●	
Management Recruiter Agent/Advisor Analytics		●	
Mobile App with Business Card Scanning	●	●	●
Onboarding & Market Coach	●	●	●
Free Customer Service Support	●	●	●
Free Weekly Training	●	●	●