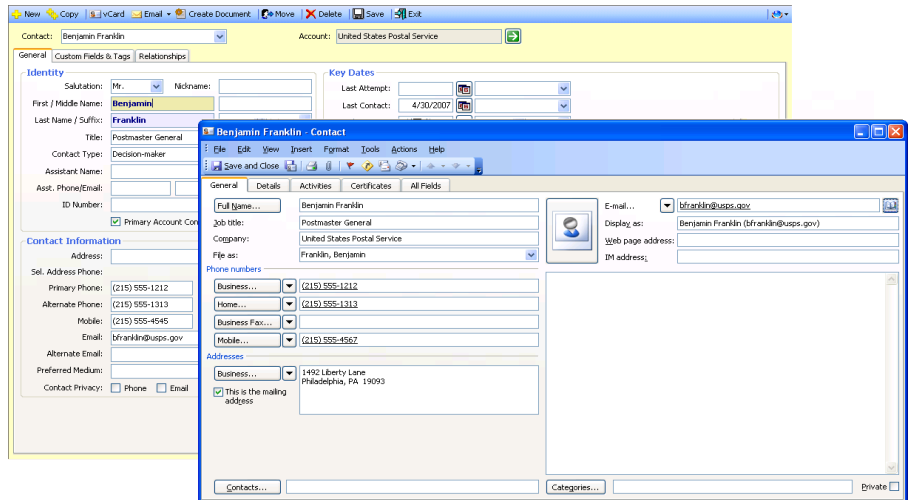


Simplicity... Empowerment... Control...

Continued growth and profitability is directly tied to a firm's ability to nurture strong client relationships.

There has been an evolution in how financial services firms manage important relationships.

Capturing and sharing information relating to prospects, clients, contacts, opportunities, documents, and activities, whether onsite or remote, presents a constant challenge for financial services firms.



BRM 6.0 brings CRM for Financial Services firms to a new level with the most flexible, easy to use solution available.

BRM 6.0 removes the user adoption and ongoing usage barriers of traditional CRM solutions. *Users simply open Outlook and begin working.* **BRM 6.0** captures any entry and update made in Outlook and allows them to be shared as required. **BRM 6.0** is the ideal solution for financial services firms.

BRM 6.0 is a flexible solution that fulfills the needs of all of the types of users in a financial services firm, including management committees, client teams, project managers, business development, professionals, relationship managers, secretaries, marketers, and system administrators. **BRM 6.0** will grow with your firm and conform to your changing needs.



BRM Mobile 2.0 provides real-time access to all your client information, anytime, anywhere, directly from your Smartphone. Whether viewing client information before a meeting, or capturing activities after a meeting, or accessing and emailing a document, **BRM Mobile 2.0** is the answer.

BRM Mobile 2.0 provides remote access to:

- Clients
- Documents
- Contacts
- Activities and Tasks
- Opportunities
- Timesheet