SMARTLINK for
Charles Schwab

Create an integrated experience between SmartOffice and Charles Schwab

As a Registered Investment Advisor, you want to maximize the amount of time you spend servicing your clients and growing your business. But juggling multiple technology solutions that don't communicate with each other can chip away at your productivity and get in the way of achieving your goals.

Ebix's SmartOffice, the customer relationship management (CRM) solution for RIAs and advisors, can help you overcome these obstacles. If you rely on technology from both SmartOffice and Charles Schwab to manage your book of business, you can now take advantage of a seamless integration connecting them both: SmartLink for Charles Schwab.

Eliminate Manual Data Entry—and Leverage SmartOffice's Power

SmartLink for Charles Schwab will dramatically change the way you interact with both solutions. Do you enter data from Schwab into SmartOffice manually? This add-on makes manual entry unnecessary, automatically synchronizing client investment data between the two systems. Because this solution handles up to 95% of your day-to-day data entry and updating requirements, you can free yourself and your support personnel from such time-intensive tasks and direct your energies toward more productive activities.

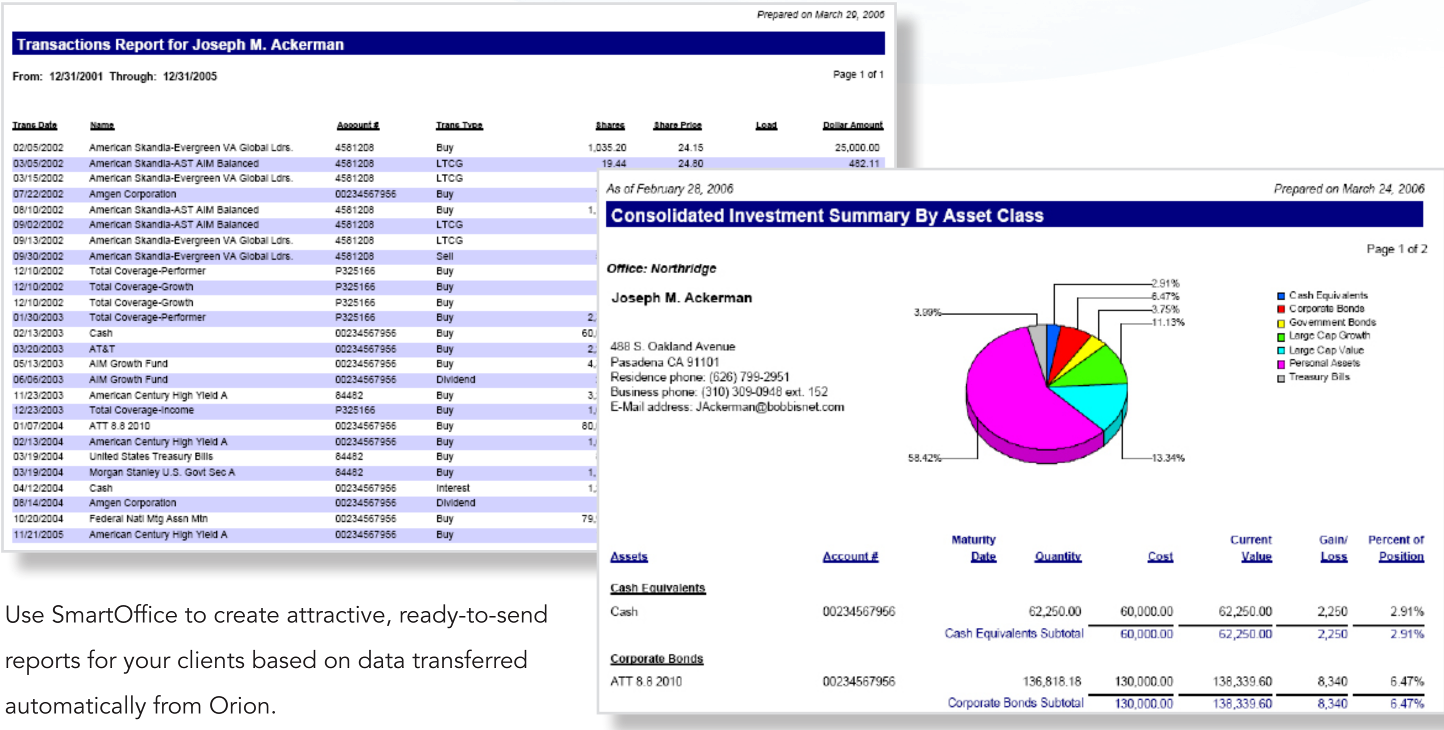
Key Benefits

- Keep client investment data synchronized between SmartOffice and Charles Schwab.
- Eliminate the need for manual data entry.
- Reduce clerical errors.
- Use SmartOffice's powerful reporting tools to create reports for yourself and clients.

The time savings alone make this integration compelling, but the benefits go beyond keeping client investment data synchronized. In addition to having client portfolio data available for viewing and analysis directly in SmartOffice, you can tap SmartOffice's powerful reporting capabilities to create reports for yourself and your clients based on that data. With this capability, you gain a deeper understanding of your clients' needs while keeping your clients better informed about how their money is working for them.

Harness the Power of Both Systems

Using two different technology solutions to service your clients doesn't have to be an exercise in inefficiency. Enjoy the benefits of both SmartOffice and Charles Schwab while boosting your productivity.



Use SmartOffice to create attractive, ready-to-send reports for your clients based on data transferred automatically from Orion.