

Advisor Group All-Inclusive Package Features	Monthly Price Per User
	\$65
Contacts	✓
Calendar and Time Management	✓
Comprehensive Notes and History (SmartPad)	✓
Document/File Storage	✓
Microsoft® Office Integration (Word/Outlook/Excel)	✓
Microsoft® Outlook Plug-In	✓
Microsoft® Exchange Sync	✓
Mass Communication	✓
Mobile (SmartOffice Anywhere)	✓
Insurance Tracking (SmartPolicies)	✓
Investment Tracking (SmartInvestments)	✓
Group Insurance Tracking (SmartGroupBenefits)	✓
Position Level Investment Download (Albridge®)	✓
Dynamic Report Creation	✓
Letter/Email Template Administration	✓
Sales/Workflow/Process Tracking (SmartOpportunities)	✓
Agent Commission Tracking (SmartCommissions – LITE)	✓
Lead Tracking and Distribution (SmartLeads)	✓
Event Management (SmartSeminars)	✓
Recruit Tracking (SmartRecruiting)	✓
eFile Cabinet (Docupace)	✓
Other Key Vendor Partner Integrations (e.g. eMoney, LaserApp, Mobile Assistant)	✓