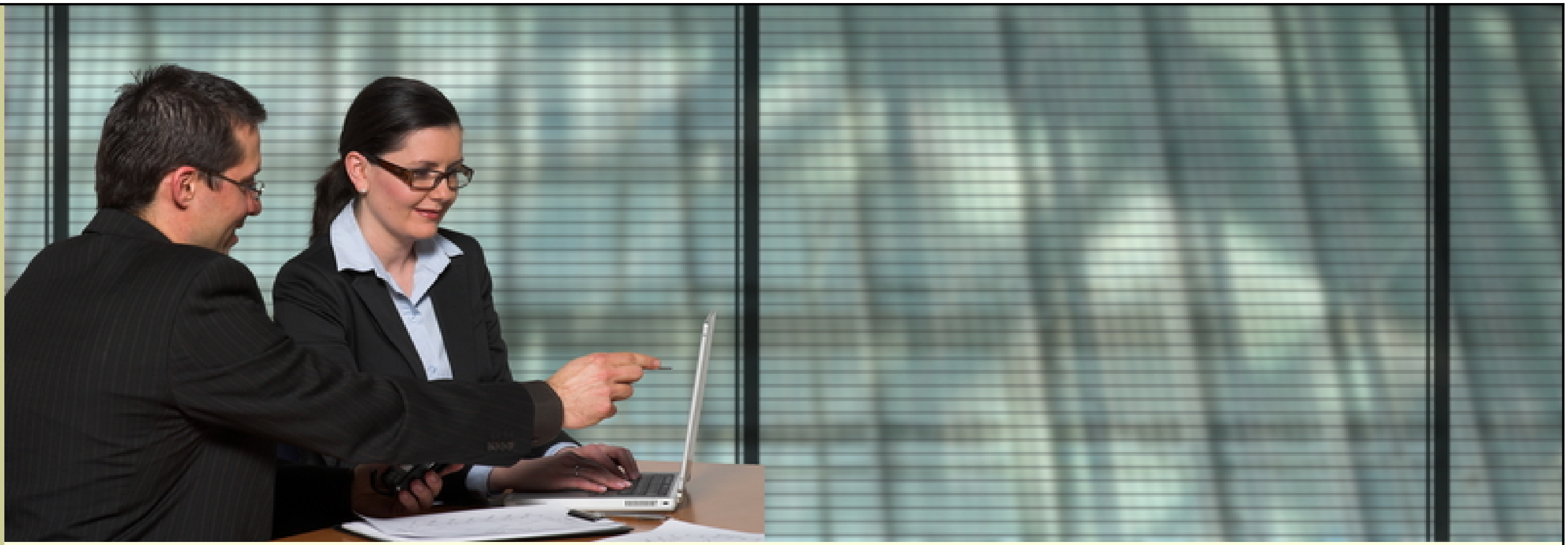

ClienTalk®

Advisor Resource Alliance

ARA360.com

Mission

The ClienTalk® Survey System provides unparalleled insights into the client's expectations, thoughts and feelings about their advisor's service model. Its unique reporting and query features allow advisors to pinpoint specific practices, services and behaviors needing attention. ClienTalk® will always be 100% advisor confidential and 100% respondent anonymous, thus protecting the integrity and honesty of its data.

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Vision

- ClienTalk will be the standard by which advisor surveys are judged.
- ClienTalk's design flexibility will allow it to adapt to industry behavioral changes.
- Its design will always be based on advisor confidentiality and respondent anonymity.
- ClienTalk will always be priced within the budget of today's professional advisor.
- ClienTalk will always respect the privacy of the advisor's client data and will never breach that trust.

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ClienTalk®

Values

- We value the importance of privacy, the bedrock of any financial relationship.
- We value the integrity of data, the foundation for proper decision-making.
- We value confidentiality, <u>your</u> information is precisely that….. <u>your</u> information.
- We value respondent anonymity, the primary driver of honest answers
- We value lifetime relationships, each of us getting better with age.
- We value the importance of reputation, <u>yours and ours</u>
- We value <u>your</u> input and opinions, the keys to our growth

ClienTalk®

Beliefs

- We believe that today's professional advisor works very hard to create lifetime relationships.
- We believe today's professional advisors must constantly be assessing and improving their business models.
- We believe advisors can improve their business model just by asking their clients.
- We believe clients are more than willing to help advisors improve their business models.
- We believe by asking clients to participate in a survey demonstrates the ultimate respect for those clients.
- We believe an annual client survey demonstrates that an advisor is managing a "client-centered" business.

What is ClienTalk?

- The ClienTalk Survey System is a web-based, respondent friendly, totally anonymous and completely confidential client feedback and analysis process.

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Why Is ClienTalk Important?

- It’s a great public relations tool
- Proactive vs. reactive communication
- Strengthens client-relationship model
- Provides accurate actionable feedback
- Uncovers attitudes and feelings
- Provides benchmark for measuring improvement
- Demonstrates caring and interest in clients
- Reveals the advisor’s actual value

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The Power of Asking

- Clients are flattered that you asked
- It shows that you respect their opinions
- Because you help them, they will help you
- The process is anonymous and nonthreatening
- They enjoy being heard
- They care about you
- They want you to be successful

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ClienTalk® Features

- Provided by independent 3rd party
- Designed by industry professionals
- Advisor Friendly - easy to administer
- Client Friendly - easy to take (point-and-click)
- Time-tested questionnaire
- Extraordinary response rates
- State-of-the-art query capabilities
- Easy-to-read reports
- Easily affordable
- Tax deductable
- 100% confidential and private
- 100% money-back guarantee

ClienTalk 20/20 Insights

Discover the following:

- Performance Gaps - differences between client expectations and advisor behavior
- Overall satisfaction levels with advisor and staff
- Referral opportunities – clients most likely to refer
- Client satisfaction with advisor knowledge/expertise
- Client perception of advisor ‘value’
- Client communication preferences
- Clients most willing to increase AUM
- Specific ideas to improve client service protocol
- Clients at risk of reducing AUM or transferring
- Clients’ economic concerns for the next 12 months
- Top three reasons for investing
- If clients have reasonable ‘pre-tax return’ expectations

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Anonymity Promise

- ClienTalk will never know the names of any respondent. All respondents use a unique seven digit code provided by the advisor. All names and addresses of surveyed clients are completely controlled by and only known by the advisor.
- ClienTalk results are available to the advisor only. A password-protected system assures that only the authorized advisor can access the results of ClienTalk or use the query capabilities of ClienTalk.

ClienTalk®

Ordering Options

- (1) One-Year License, $1,395* [ARA savings = $100]
- (5) One-Year Licenses, $5,975* [ARA savings = $500]
- (10) One-Year Licenses, $10,950*
- Individual Edition
  - License + 4 hours of one-on-one coaching, $2,495*
  - Additional coaching / consulting available @ $250/hour
- Group Edition
  - 90-day group coaching program, $1,995 per advisor
- Enterprise Edition
  - 100+ licenses, custom pricing

For more info, please contact steve@ara360.com or call us at 770.433.1955