

Functions limited to buttons on screen (straightforward functionality)	X		X	X						
Cost	\$345	\$398	\$495	\$499	\$699	\$899	\$995	\$199	\$199	\$0
Cost with Assistant (2 users)	\$345	\$696	\$595	\$899	\$1398	\$1049	\$1245	\$398	\$398	
Video Tutorial	X	X	X	\$99	X	X	X	X	X	
Telephone Based Support	X	X ⁹	X	X	X	X	X	X ¹²		
Annual Support (Base Product)	\$100	\$299¹⁰	\$150¹	\$200	\$360	\$349	\$500			
Annual Support with Assistant (Base- 2 Users)	\$150	\$299¹⁰	\$200¹	\$374	\$720	\$549	\$750			
Commission Module Annual Cost	X		X	(+\$120)	(+\$240)	X				
PDA Module Annual Cost	X	X	X	X	(+\$180)	X	X			
Laptop Synchronization Annual Cost	X		X	(+\$120)	(+\$180)	X				
Total Usage Cost with assistant for 5 years (including initial purchase with no modules)	\$945	\$1993¹¹	\$1495²	\$2395	\$4278	\$3245	\$4245	\$798¹⁶	\$798¹⁶	\$0

(prices listed are as of 5/2004: This feature chart is based on our research of our competitor's products and reflects our conclusions about features in our competitor's products.)

The Contact Sage Pro is the **best value** among **all** of the industry specific systems, even though we compared our complete system to the base version of our competitor's system for an agent and an assistant. In fact, the price of our system is **slightly more than generic programs** which don't offer insurance and investment functionality. Beyond being affordable, our systems are comprehensive, and they are simple to learn and use.

Symbol Legend:

()^{number}- footnote

((price))- price of version with that feature

(+(price))- additional cost added to base program and support cost for that feature (the chart is divided into program, training, and support sections)

(number)- number of fields

Footnotes:

¹ 6 months of support included with initial purchase

² this is for the Agency Partner version with no additional modules

³ prices are \$100 more for the Network Version and \$200 more for the Multiproducer version

⁴ includes first 5 users, \$99 for each additional

⁵ includes first 5 users, \$199 for each additional

⁶ synchronizes address book data only (name,number,address), **not investments/policies/notes/user fields/etc.**

⁷ requires network version, \$299 per workstation

⁸ synchronizes address book and note data only from Desktop to Palm (cannot synchronize changes), not investments/policies/etc. (this greatly limits the functionality of the PDA module)

⁹ support for Act! Is \$4/min or \$30/incident, Act4Advisors sells 6 hour support blocks for \$299

¹⁰ 6 hour support block is \$299, new versions of ACT! must be purchased as they are released- generally every 2 years

¹¹ this figure assumes that new versions of Act! are purchased every 2 years at a cost of \$100 per version, and that the users will require a total of 18

- hours of support over 5 years (purchased in 6 hours blocks for \$299 per block)
- 12 support for Act! Is \$4/min or \$30/incident
- 13 very limited functionality, Outlook was designed as an Email and Calendar program
- 14 24 for each insurance type (Life, Health, P & C, Disability, etc.) and 24 for each investment category (Mutual Fund, Stock, Bond, etc.)
- 15 24 total for all policies and 24 total for all investments
- 16 this figure assumes that new versions are purchased every 2 years at a cost of \$100 per version
- 17 80 for each contact type (Individual, Business, Trust, etc.)
- 18 changing to Microsoft .net in 2005 or 2006

CONTACT Sage Pro is a Trademark of B & I Computer Consultants, Inc.

ACT4Advisors is a Registered Trademark of Allied Financial Software.

Agency Expert is a Registered Trademark of GBS Inc.

Advisor's Assistant is a Registered Trademark of Client Marketing Systems, Inc.

EZ-Data is a Registered Trademark of EZ-DATA, Inc.

Wealthspring is a Registered Trademark of Mountech Software, LLC

Junxure-i is a Registered Trademark of CRM Software.

ACT! is a Registered Trademark of Interact Commerce Corporation.

Goldmine is a Registered Trademark of Goldmine Corporation.

Outlook is a Registered Trademark of Microsoft Corporation.

System Screenshots: (Systems are organized by base price and functionality in rows)

CONTACT Sage Pro 2.2™ (\$345)

CONTACTS Search List Print To Do Add Copy Delete Update To Do Remov notes Files URLs Family Baine Policy Invt

Mr. FN William M J LNO Jacobs User Fields Link < > Edit New Links 1

Title Mr. And Mrs. William Jacobs t D 731-89-4732 Link Type Spouse Head Hstid

Company B & I Computer Consultants, Inc Nickname Bill PIP Hus William Jacobs G A

Address1 219 Congressional Lane Birth Date 04/25/1958 BIP W/M Inessa Jacobs G A

Business Suite 219 Industry Computer Occupn Management G A Spouse

City Rockville MD 20852- Total Life Insurance Policies

Homephone (301) 809-2828 Workphone (301) 942-1405 2 Assistant Diane Policy Type Various

Telephone (301) 942-7879 Faxphone (301) 942-0205 Contact Pref email Company Various

E-mail bill.jacobs@bandisoftware.com Busn Call Freq 3 months Issue Date 01/19/2004-03/22/2004 Invt

Risk Level Aggressive Income 65,000 Last Contact 03/19/2004 Y Total Death Benefit \$800,000.00 Policy

Invt Goal Growth Worth 500,000 Next Contact 06/19/2004 C Total Policy Value \$31,260.67 P Total

Click Policy (to the right) or Policy (at the top) To View Individual Policies. I Total

Preferences to be a little risky
Height: 6' Weight: 195 lbs. Smoker: No
expecting inheritance 7/1/04

Type Individual Status client Priority 5 Producer Bill Add Date 03/06/2003 C

04/25/2004 plans to purchase vacation home next 6 months
04/20/2004 birthday letter sent
03/11/2004 Out of town until 4/2/2004
10/22/2003 Prefers small cap mutual funds

Print To Do Fill Merge Dear Lu T F N SL Email Select Email Status Filter Type Filter Rolodex Tracks Timer Find History Guide Profile 1 Profile 2 Close

Act4Advisors™ (\$398)

Act4Advisors™

Contact: James Sample Spouse (last) Julia Clark

Home Phone 909-585-0095 Home Address 123 Fake Street

Work Phone 770-475-0425 Ed. Home City Canton Place

Cell Phone 770-475-0485 2nd/3rd/4th Line Home State GA Home Zip 30114

Page E-mail Address jms@act4advisors.com

Website Home State MD MD Site www.act4advisors.com

Sub Title Last

Client ID Client ID

Last Results Click for information

Personal Info: Contact Personal Info Spouse Personal Info Children's Info

Contact Personal Info: Contact SSN: 222-55-2222 Date of Birth: 1/12/1970 Birth Month: Jan Birth Year: 1970

Spouse Personal Info: Spouse SSN: 222-55-2222 Date of Birth: 1/12/1964 Birth Month: Jan Birth Year: 1964

Children's Info: Children: Date of Birth: SS N Birth Month: Birth Year: Age

Child 1: Date of Birth: 4/13/2003 SS N: 999-99-9999 Birth Month: April Birth Year: 2003 Age: 1

Child 2: Date of Birth: 4/17/2003 SS N: 999-99-9999 Birth Month: April Birth Year: 2003 Age: 1

Family Financial Info: Income: \$90,000.00 Estimated Net Worth: \$143,000.00

Client Type: Assets and Liabilities Tax Bracket: 21% Risk Tolerance: Conservative Growth

Personal Interests: Computers Data and Utilities

Comments: Comm/Fees to Date: \$2,500.00

Copyright © All Financial Services

Web RFP Personal Policy Info Invt Info Insurance Accounts/Retire/Loans Advisors Suggestions

Agency Expert 6.3™ (\$495- Please see chart for module pricing)

Agency Expert 6.3™

General Info Employee Info Referrals/Advisors User Fields Attachments

Personal Information

Last Name: Smith Work Phone: 0 800 555 9512 x17

First & MI: John Home Phone: 1 083 305 8225 x

Profile: Mr. Suffix: P.D. Fax: 2 083 555 9512 x

Saltation: John Agent Name: Frank Rowe

Account ID: JF447098 Agent Phone: 0 800 555 2613 x5

Address: 5234 Main Street Marital Status: Married Sex: M

Age: 42B4 SSN: 512 81 4885 # Children: 2

City: Erie Drivers Lic.: 0028 88763 Tr @ Addr: 3

County: Rowler BOB: 00 16 1364 Age: 36

State: CO Zip Code: 80516 Height: 6 7 Weight: 295

E Mail Address: jsmith@bestinsurance.com Will Date: 7/12/86 Insurable?:

Web Address: www.bestinsurance.com Last Modified: 7/11/92 Broken?:

Other Information

Lead Source: Yellow Pages Status Date: 5/15/01 Last Contact:

Status: Client Initial Contact: Contact Type:

New Client Edit Changes Delete Edit Search Clear Policies Investment

Advisor's Assistant 2.7™ (\$499- Please see chart for module pricing)

Advisor's Assistant 2.7™

New Client With Insurance

James Madison Business Address

Type: Client # of Hold: Jim

Address: Rt. James Madison Primary

Business: James Madison, A Law Corporation

Title: Street 1: 9567 Walnut Street, Suite 400

Street 2: City, State: Part Conway VA 24796

Greating: Jim

Email: Jim@jmadison.com

Web Site: www.jmadison.com

Business Phone: Phone: 212 875 3967 Primary

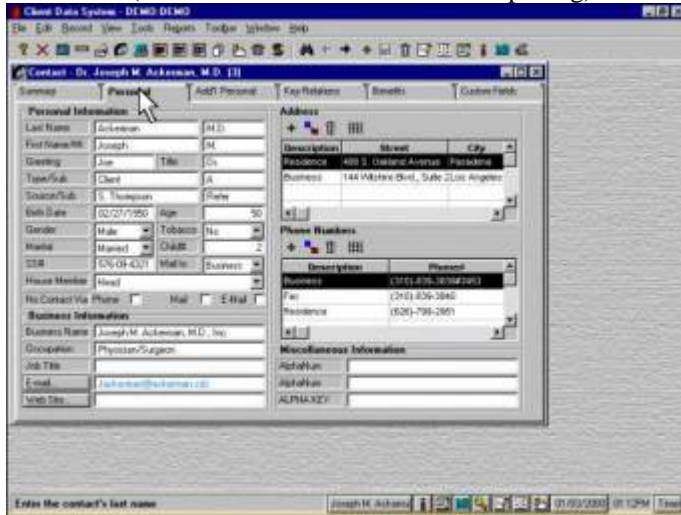
Contact: Direct Line Fax: 212 875 3960

Perspectives: Invt Owner Producer

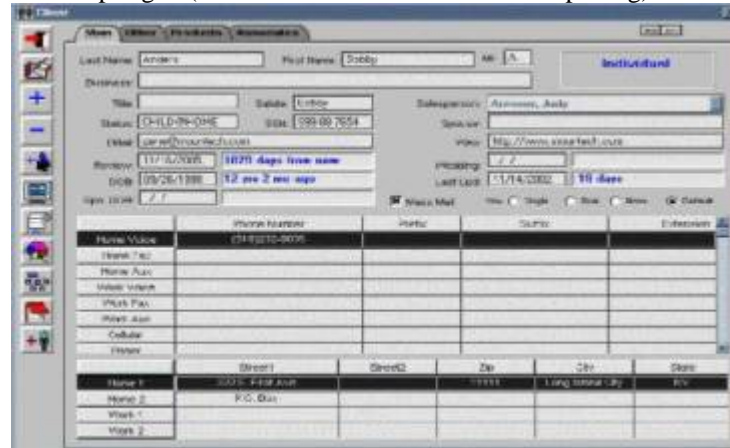
Policy Number	Type	Company	Series	Effective	Amount	Premium	Status
101010	Y	ABC	ABC123	01/01/1999	1,000,000	1,000	IN FORCE
274658763	Y	ABC	ABC123	01/01/2000	500,000	1,000	IN FORCE
342957	Y	ABC	ABC456	11/01/1999	17,000	400	IN FORCE
5443	Y	ABC	ABC789	01/20/1999	3,000	2,497	LAPSED
712047	Y	ABC	ABC1011	01/01/1991	1,250,000	2,000	IN FORCE
764328726347	Y	ABC	ABC112	01/01/2001	300,000	1,800	IN FORCE
87456	Y	ABC	ABC-VOL	01/08/1999	211,361	4,800	IN FORCE
89476574433	Y	ABC	ABC113	01/01/1999	300,000	900	IN FORCE
899788	Y	ABC	ABC114	01/11/1998	1,000,000	1,700	IN FORCE

History Investments Attachments Loans Markets Links Files Tax Fields Events Calendar Help

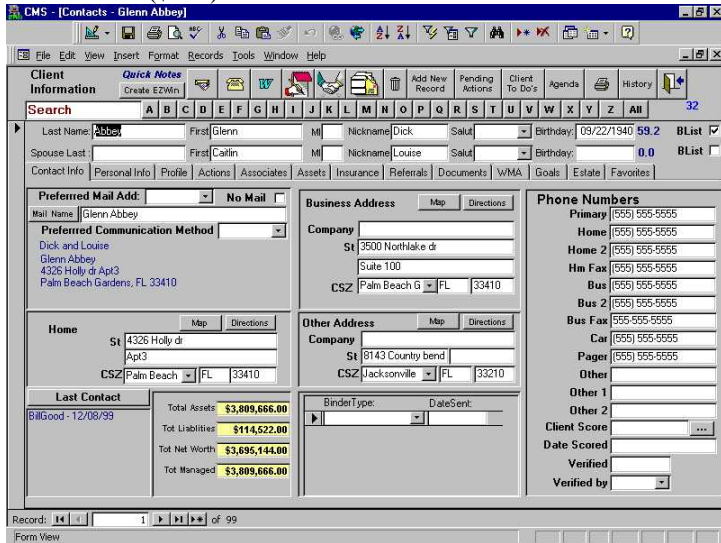
EZ-Data™ (\$699- Please see chart for module pricing)



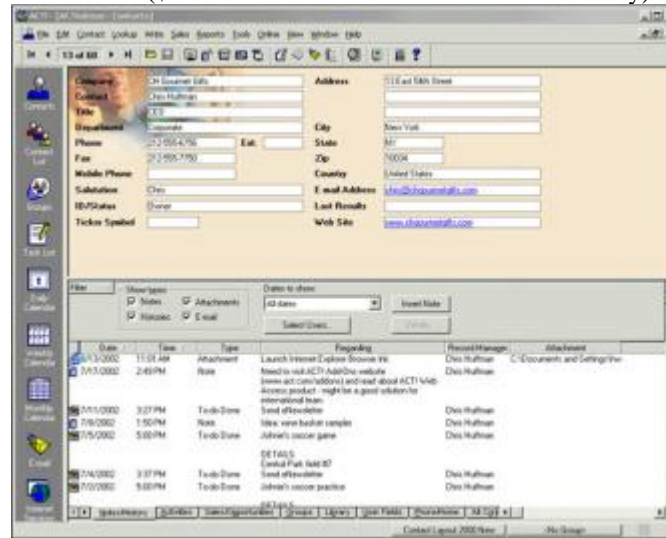
Wealthspring™ (\$899- Please see chart for module pricing)



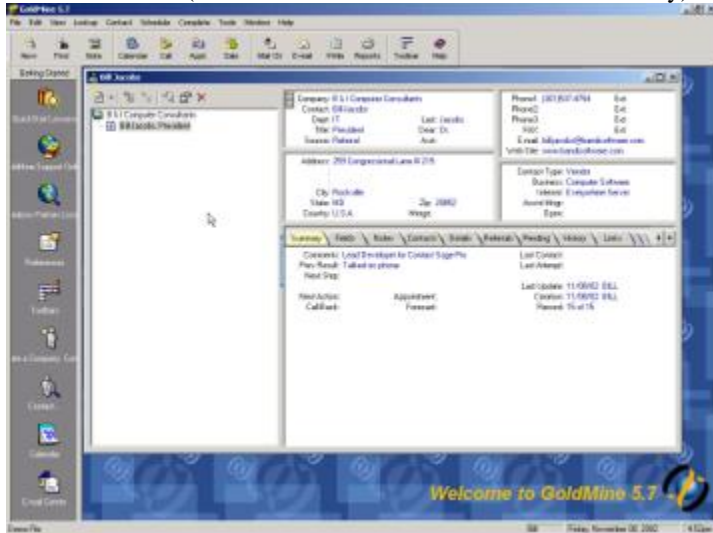
Junxure-I™ (\$995)



ACT! 6.0™ (\$199- No Insurance/Investment Functionality)



Goldmine 6.0™ (\$199- No Insurance/Investment Functionality)



Outlook™ (\$0- No Insurance/Investment/Tracking Functionality)



- CONTACT Sage Pro is a Trademark of B & I Computer Consultants, Inc.
- ACT4Advisors is a Registered Trademark of Allied Financial Software.
- Agency Expert is a Registered Trademark of GBS Inc.
- Advisor's Assistant is a Registered Trademark of Client Marketing Systems, Inc.
- EZ-Data is a Registered Trademark of EZ-DATA, Inc.
- Wealthspring is a Registered Trademark of Mountech Software, LLC
- Junxure-i is a Registered Trademark of CRM Software.
- ACT! is a Registered Trademark of Interact Commerce Corporation.
- Goldmine is a Registered Trademark of Goldmine Corporation.
- Outlook is a Registered Trademark of Microsoft Corporation.