

MobileAssistant™

Talk, Don't Type

THE IMPACT OF THE ELEPHANT

THE PROBLEM

After client meetings, how to accurately capture the information and efficiently enter into **REDTAIL**?

THE MOBILE ASSISTANT SOLUTION

- Easily capture meeting details – 2/3 of our short term memory gone after 24 hours
- Easy adoption with immediate impact
- Human, US based process critical to ensure accuracy
- Mobile, secure access to notes via mobile app
- DOL & compliance documentation impact
- **REDTAIL** integration
- More detailed notes = more opportunities
- Built-in Assistant template guide

WHY USE MOBILE ASSISTANT?

- **More organized & prepared** to understand client needs
- Better documentation to **meet compliance requirements**
- **1+ hour per week saved** for advisor
- Ability to automate delegation
- Notes delivered directly to the **REDTAIL** Contact Notes section or delivered as an Activity or Generic note.

TIME SAVINGS

- **NO TYPING**
- NO EDITING INACCURATE NOTES
- NO TIME SPENT ACCESSING PREVIOUS MEETING NOTES
- **NO WASTED ASSISTANT TIME**
- NO CUTTING/PASTING TO THE CRM
- AUTOMATION OF DELEGATION

MOBILE ASSISTANT: VALUE PROP

PROTECTION & OPPORTUNITIES

- **MORE DETAILED MEETING NOTES**
- ACCURATE MEETING NOTES
- Monthly or Annual Subscription
- **\$64.99/month or \$700/year** w/ coupon code **REDTAIL**

Includes 1,000 lines/mo (approx 100 minutes of dictation time); 15 cents/line above that.

ADOPTION IMPACT from 2017 Case Study of over 1,100 Advisors

\$9 Million vs \$7 Million

Revenue Generated

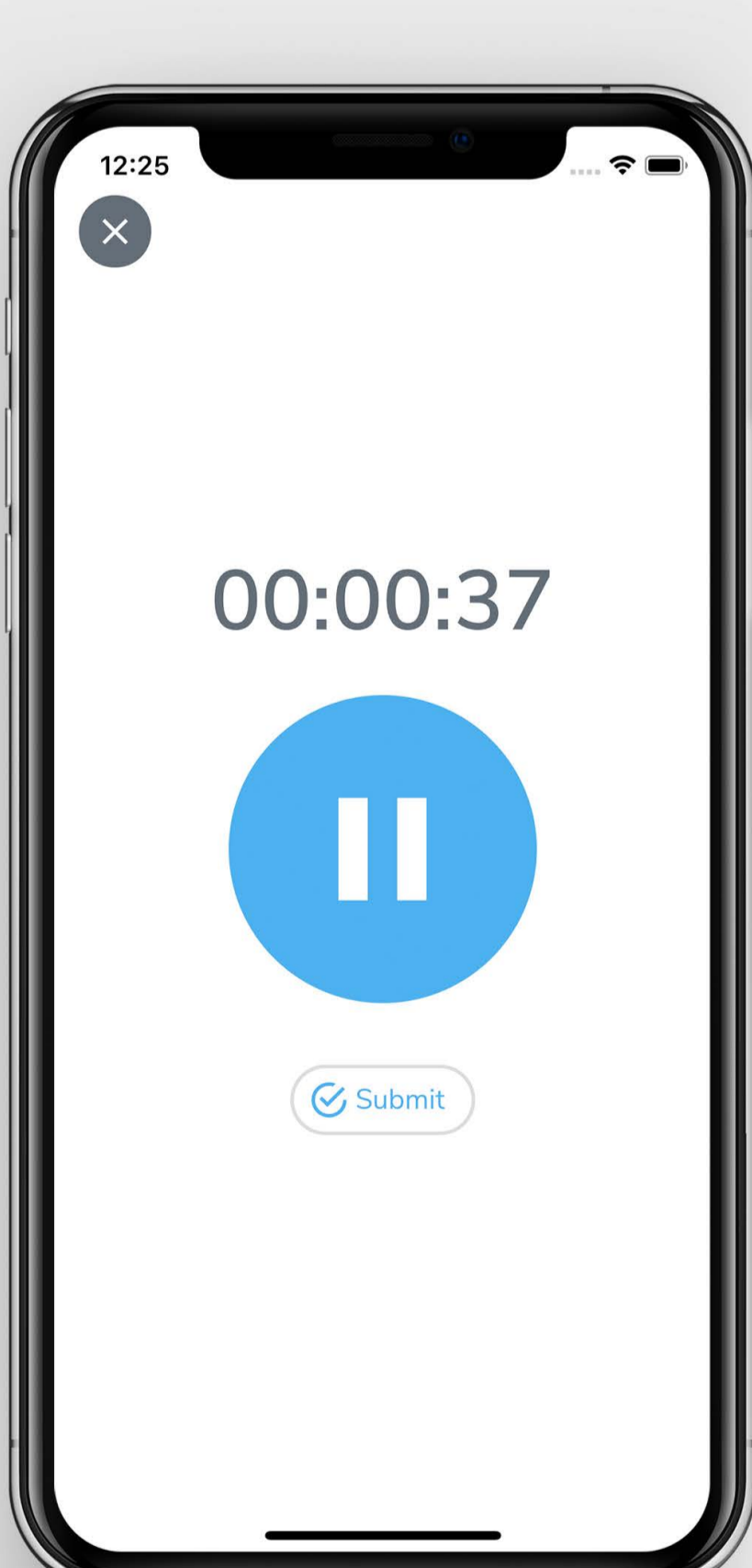
- Efficient & Frequent Adopters
- Infrequent Adopters

Mobile Assistant Included Features:

- Talk It Mobile app for IOS & Android
- The built-in Assistant template guide
- Searchable Notes Section Capability
- Multiple Email Delivery Options
- US Based Human, Professional Accuracy
- 24/7 Access

WHAT'S INCLUDED WITH YOUR MOBILE ASSISTANT SUBSCRIPTION?

Note taking should be simple

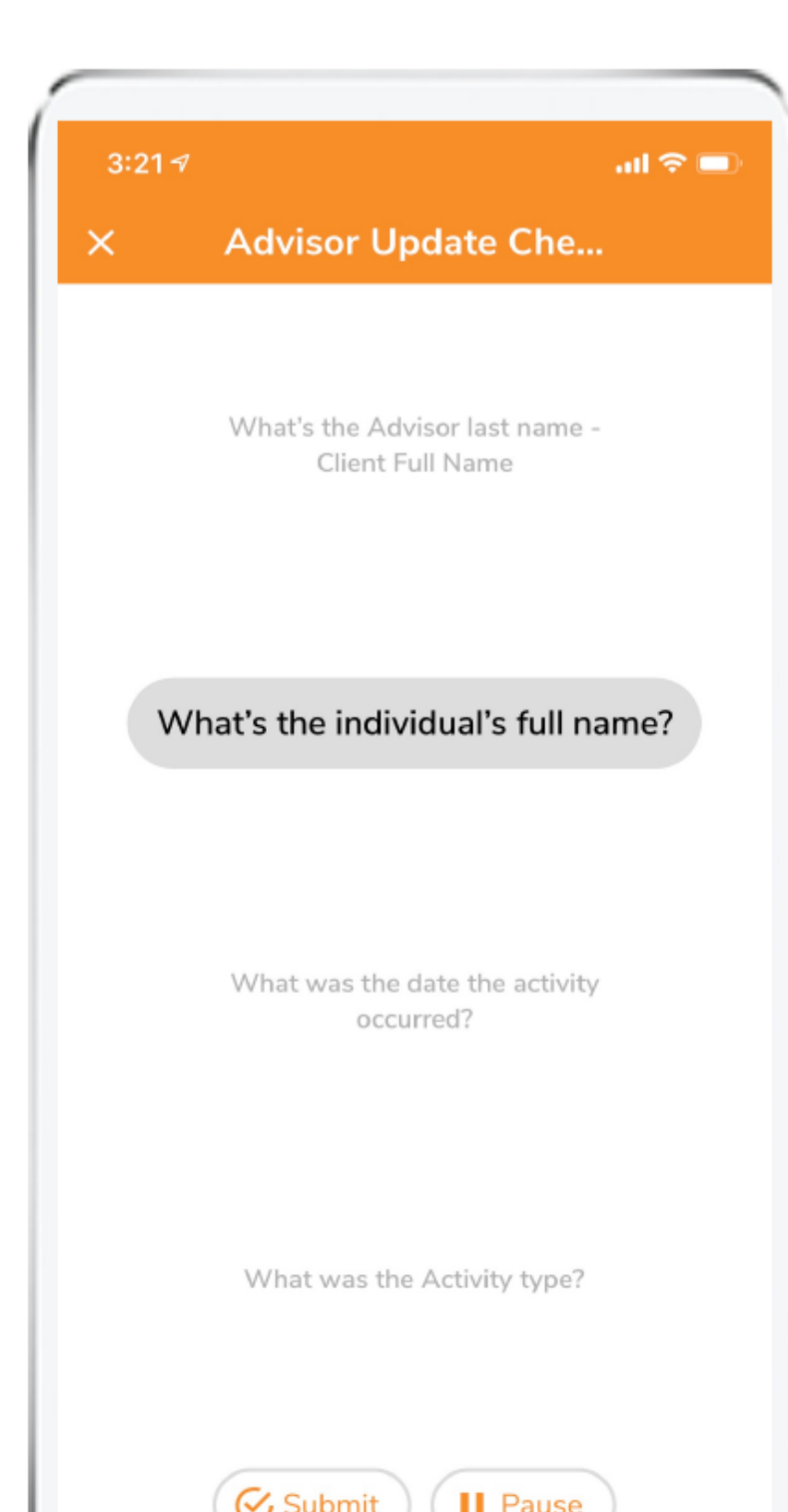
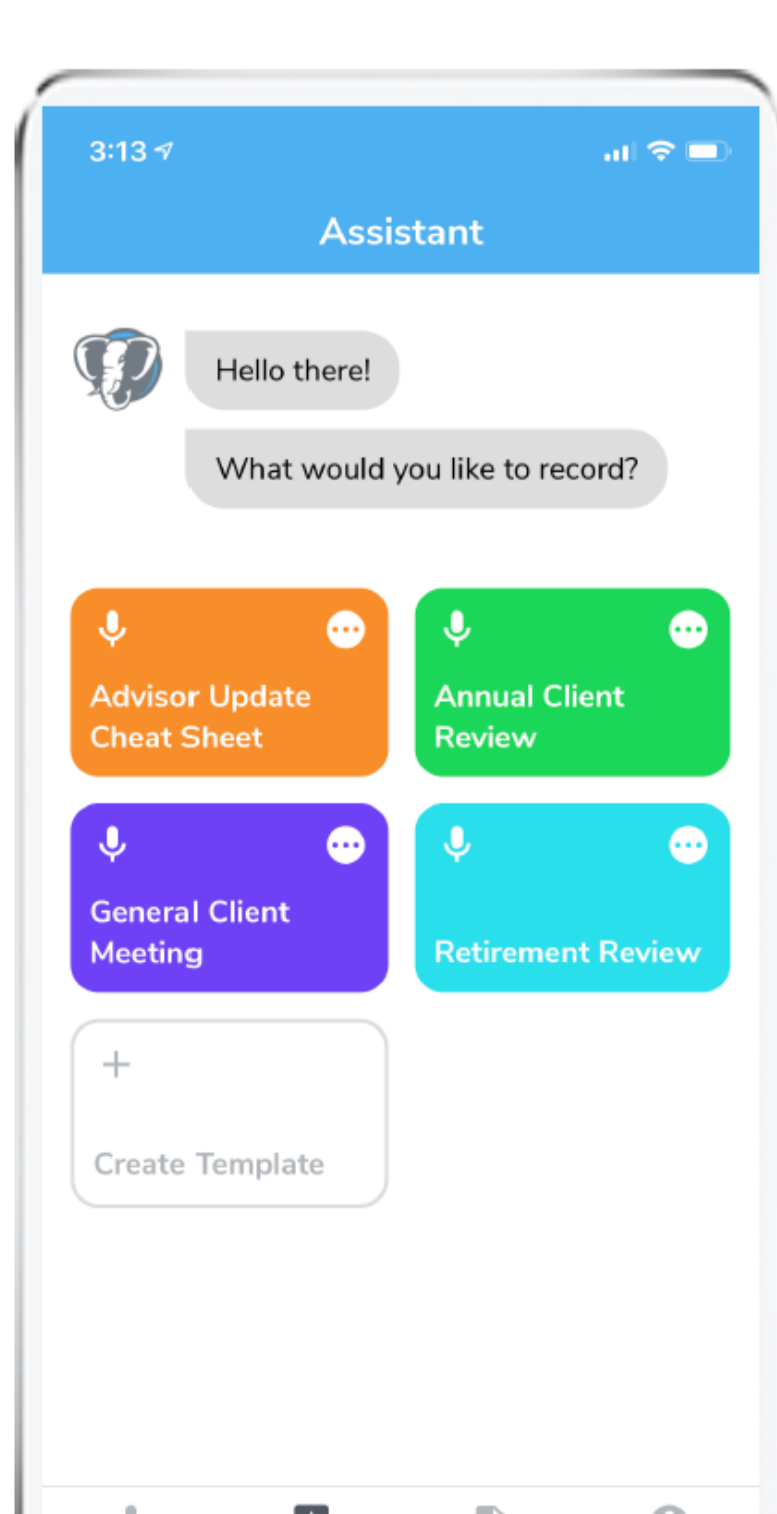


Key Points to Remember:

- Professional, human transcriptionists are typing your notes. This means you can speak naturally, and speak format instructions like "bullet point the next list" or "bold the next sentence" and it's done!
- Your note will be delivered by email within 8 bus hours.
- Say "subject line is" at the beginning of your dictation and your transcriptionist will type the subject exactly as you specify.
- Our iPhone app gives you the ability to "tag" search criteria for individual notes.
- With our **REDTAIL** integration, simply speak the contact name and we deliver your note to the Contact Notes section in the CRM, or say "Make this an Activity" or "Generic Note."

Meet your new Assistant

Designed to help guide you to record what matters most



Watch our Talk It Mobile app demo here

QUESTIONS or SIGNUP?

Give Us A Call: (888) 373-1916 or Visit: www.mobileassistant.us

REDTAIL Dashboard Free Trial SignUp MobileAssistant Messages - FREE TRIAL

Mobile Assistant/Redtail Webinar Replay

