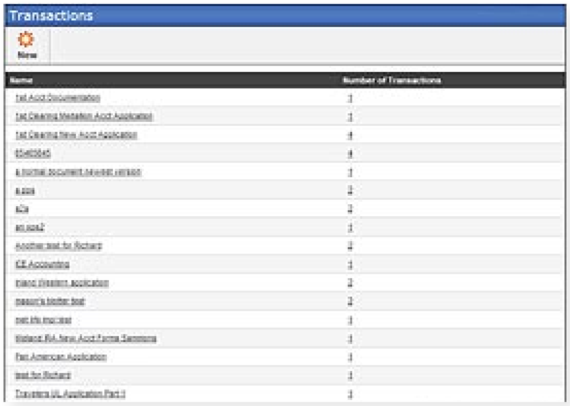
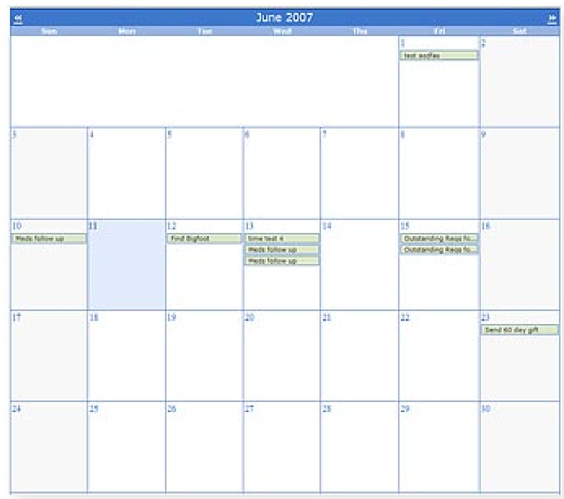
jaris

Financial Advisors Expansion
Version 2.1 Release
June 11, 2007



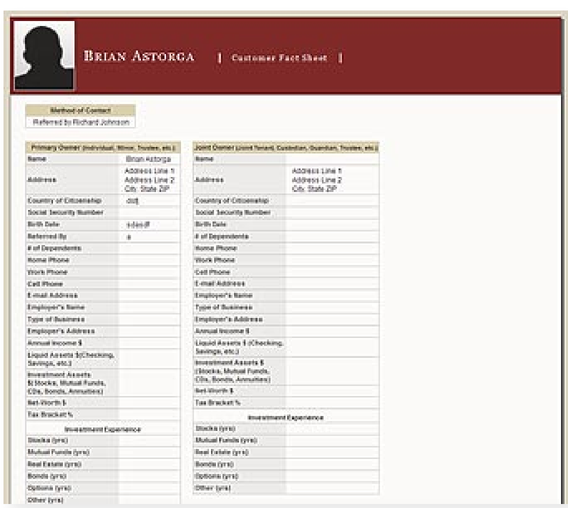
» Transaction tracking

Create transactions tied to a specific customer, and easily view all transactions for each customer.



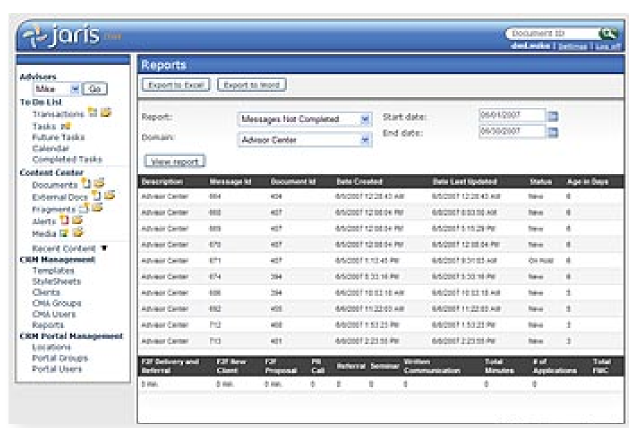
» Task calendar

Create tasks and reminders, and view them on your personal task calendar.



» Customer and agent profiles

Keep customer information close at hand with customer profiles—easy to create, and easy to update. You can even create your own profile to track registrations, certifications, and more.



» Additional reporting

View important metrics with the easy-to-use reporting feature. Simply choose a report and a date range.