



## 2022 TECH PACKAGE – PRICING & SERVICES (rev. 01-01-2022)

### Tech Package-BASIC (required for each advisor; fees are per month)

<b>DESCRIPTION OF SERVICE - per user</b>	
Email Monitor, Archive, Retrieval, Secure Email, Linked In, Twitter	
J-Pass (Commissions, reporting, client info)	
Docupace	
Wealthscape (Standard version)	
eVALUEator (no additional charge – to use HO version)	
<b>A. BASIC PACKAGE Total per month</b>	<b>\$135.00</b>

### Tech Package-Optional Add-On Features (fees are per month)

DESCRIPTION OF SERVICE	QUANTITY	UNIT COST	TOTAL COST
Morningstar		\$205.00	
Albridge		\$203.00	
Wealthscape Enhanced (real time quotes-no delay)		\$65.00	
Advisory World		\$40.00	
Fee-Based Tools (formerly Advisor Channel)		\$100.00	
<b>Additional</b> Wealthscape Account		\$ 35.00	
<b>Additional</b> Email Account (per email address)		\$20.00	
Facebook Business Account monitoring		\$25.00	
Linked In Company Page monitoring		\$25.00	
March 2021 - My Rep Chat texting		\$10.00	
<b>B. OPTIONAL ADD-ON Total per month</b>			<b>\$</b>

<b>TOTAL FOR BASIC AND SELECTED ADD-ONS PER MONTH (A + B) =</b>	<b>\$</b>
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### Other Software/Services Available Direct from Vendor

DESCRIPTION OF DIRECT VENDOR SERVICE	
E-Money	Contact Vendor for Pricing/Info
Moneytrax	Contact Vendor for Pricing/Info
Redtail (Contact Management System)	Contact Vendor for Pricing/Info

Each month, the above fees will be deducted from the advisor's commission account. If there are not sufficient funds to cover the monthly deduction, the negative balance will be carried forward until sufficient commissions are received to bring the balance to zero. If the commission account remains negative for three months, the advisor will be invoiced for the outstanding balance.