



**Acti***Fi*

# **Know More!**

## **Client Relations**

**Grow your practice through better  
prospect and client information**

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# ActiFi The ActiFi Story



**PEOPLE**



**PROCESS**



**TECHNOLOGY**

- Leader in creating scalable practice management solutions
- Provide business consulting and direct program implementation
- Conduct proprietary advisor technology research
- Develop custom software for financial institutions that enables system-wide practice management

# ActiFi Imagine...

- Helping your advisors grow their businesses (and thus your business) through better information
- Providing meaningful value to your advisors, increasing satisfaction and loyalty
- Connecting with your advisors EVERY TIME they're online, and promoting your brand in a meaningful way
- Providing direct access to your information and content, EVERY TIME your advisors are online

# ActiFi What Advisors Want...

**Advisors want two things from institutions: high-quality products and assistance in becoming more successful. Ninety-percent of advisors want support and guidance to help grow their business.**

CEG Worldwide Study

**Very few firms are engaging advisors in a way that satisfies their needs. Most value-add programs have very little follow-up. They tend to die on the vine.**

Financial Research Corp. Survey

**Programs from financial enterprises that incorporate a clear path toward implementation are the most successful. Advisors prefer value-add programs but nearly three-quarters of the top-ranked programs were one-time offerings.**

Financial Research Corp. Survey

# ActiFi What Advisors Need

- Continual pipeline of high-valued prospects that meet specific demographic and psychographic criteria
- An easier, more personal way to generate referrals
- Information to build relationships and trust with prospects and new clients
- Information to provide ongoing value to existing clients

# ActiFi Advisors & Relationship Intelligence

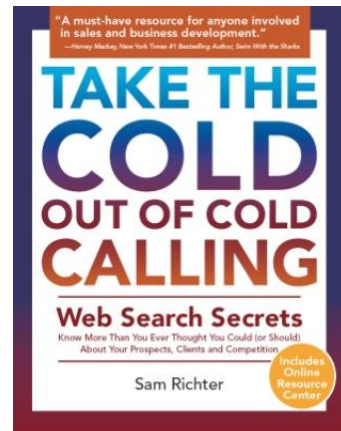
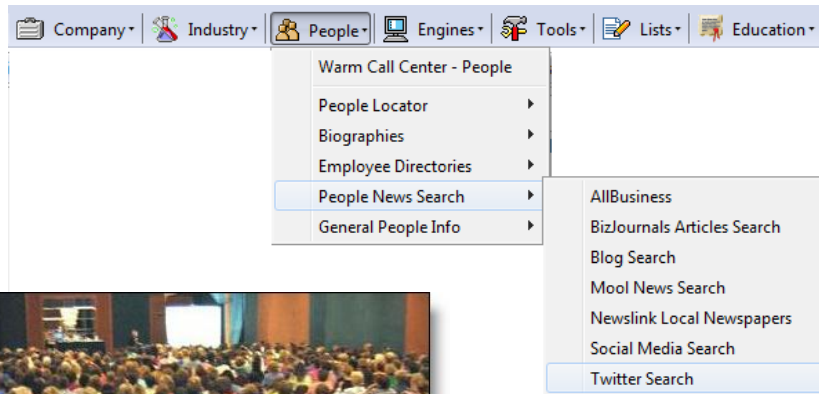
- **Relationship Intelligence is...**

“The ability to quickly find information on people, companies, and industries and use the information to build meaningful relationships”

  - Advisors who use Relationship Intelligence...
    - Close more new business
    - Deepen relationships with existing clients
  - Most advisors recognize the value of information and know how to use it once they have it
  - However...almost all advisors have a difficult time **quickly** finding accurate, relevant information

# Know More! Client Relations

An ongoing, customized, interactive program to help advisors know more than they ever thought they could (or should) about their prospects, clients, and the competition



**An interactive program that promotes your brand and content and helps your advisors grow their businesses...**

- In-person training
- Hands-on workshops
- Monthly Webinars
- Book and resource guides
- Monthly “tips and tricks” newsletter
- Downloadable online Relationship Intelligence Toolbar

# ActiFi Components - Training

“Sam delivered a truly groundbreaking and excellent program to our diverse group of financial planning executives. His material for generating new business and providing value to existing clients is motivating, innovative, and incredibly practical.” *Financial Planning Association*



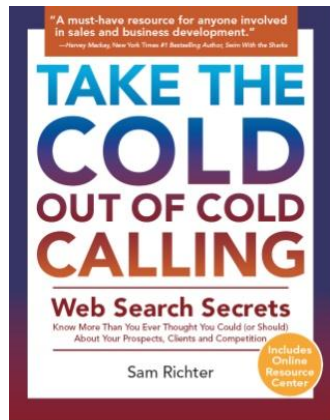
- [Click Here](#) to watch a presentation highlight video
- [Click Here](#) to read seminar reviews

- World-class in-person programs and online Webinars
- Teach advisors and their teams how to find information in ways they never thought possible
- Incredibly fun, eye-opening, and practical, with a high “WOW” factor
- Rated by advisors/executives as the best training available
- Completely customized

# ActiFi Components - Book & E-News

“The must-have resource to win new business and provide exceptional client value.”

*Harvey Mackay – New York Times #1 Best Selling Business Author, Swim with the Sharks*



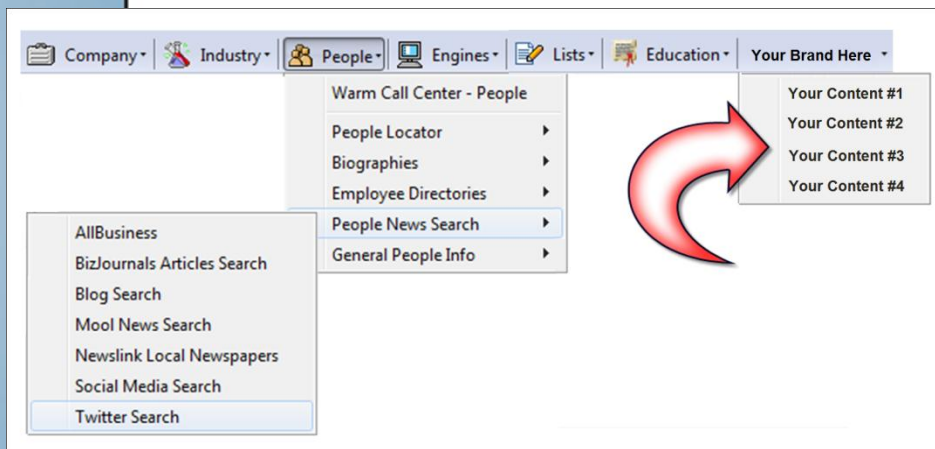
- [Click Here](#) for book endorsements
- [Click Here](#) for Amazon reviews

- Top-selling and award-winning book; in its Fifth Edition
- Step-by-step instructions on how to access hard-to-find business, sales, and competitive intelligence
- Endorsed by some of the nation's top business leaders
- Monthly newsletters featuring new research “tips and tricks”
- Book and newsletter guides can be completely customized

# ActiFi Components - Custom Toolbar

"Anyone can look at a company's Web site. What Sam provides are the secrets on how to find inside information and then how to apply it to impress any person, any time."

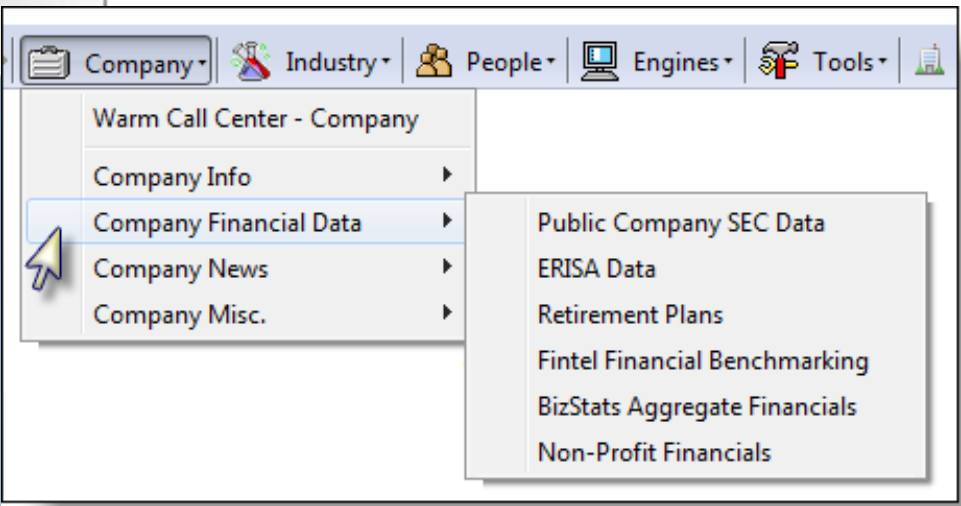
*Keith Ferrazzi, Founder & CEO Ferrazzi Greenlight  
Bestselling Author, Never Eat Alone*



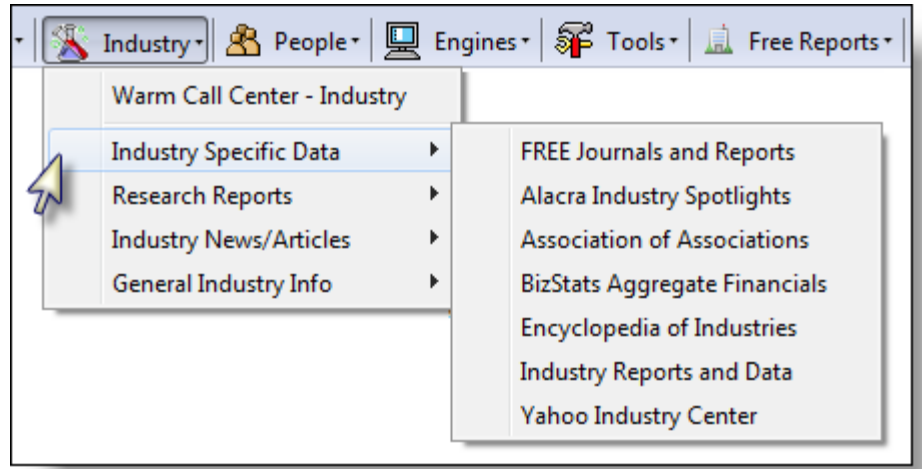
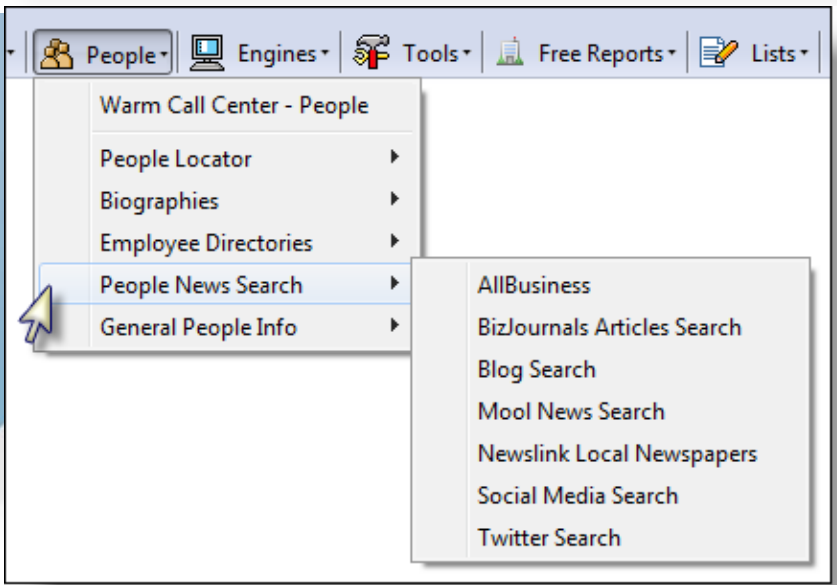
- [Click Here](#) to download the standard Warm Call Toolbar

- Downloadable Toolbar puts custom Know More! information resources on any Web browser, all of the time
- Supports the training making it easy and fun to practice what is taught
- Auto-updating; as content is added and/or revised, installed Toolbars automatically update
- ActiFi manages technical and customer support; includes built-in help pages
- Leverages existing toolbar software; no technology fees
- E-Trust certified; safe for all PCs
- **Completely customizable** with your brand/content – you're in front of customers **anytime they're online!**

# ActiFi Toolbar - Supports the Training Program

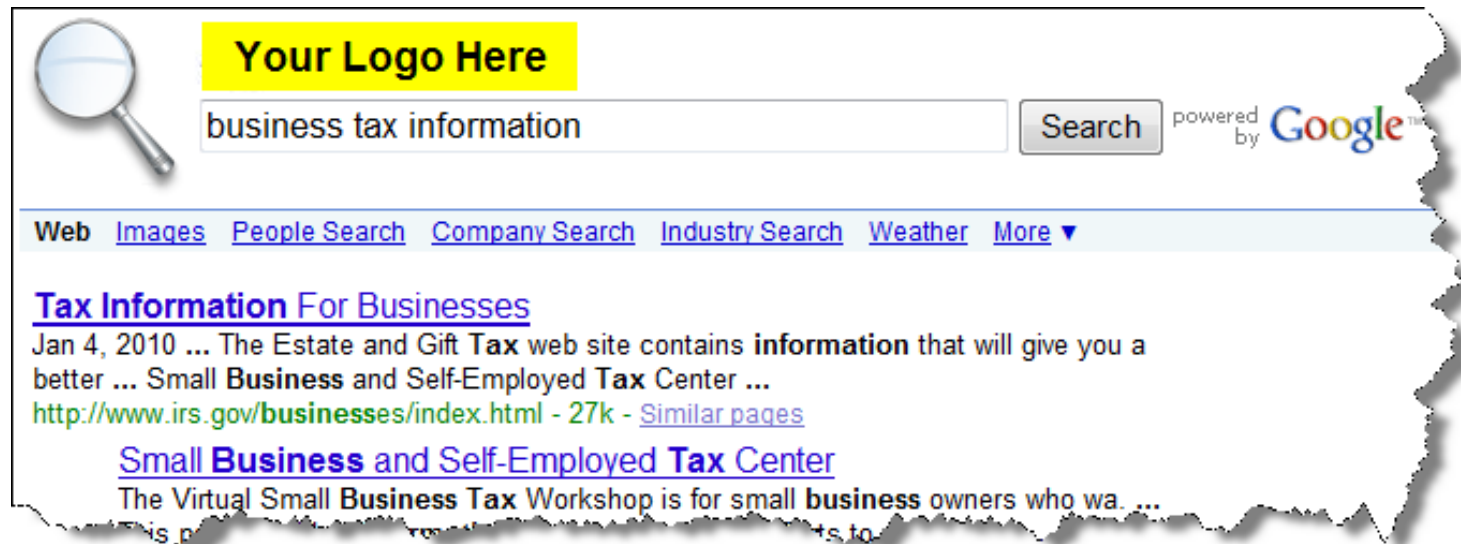


“Thank you for the Warm Call Toolbar. I found superior information through your sources after looking in vain via other sites and databases that I pay for (and the others aren’t cheap!). I know my client will be “wowed” with what I found...you’re a business life saver!” *Terrie S. Wheeler, Founder, PSM*



# ActiFi Toolbar - Your Brand

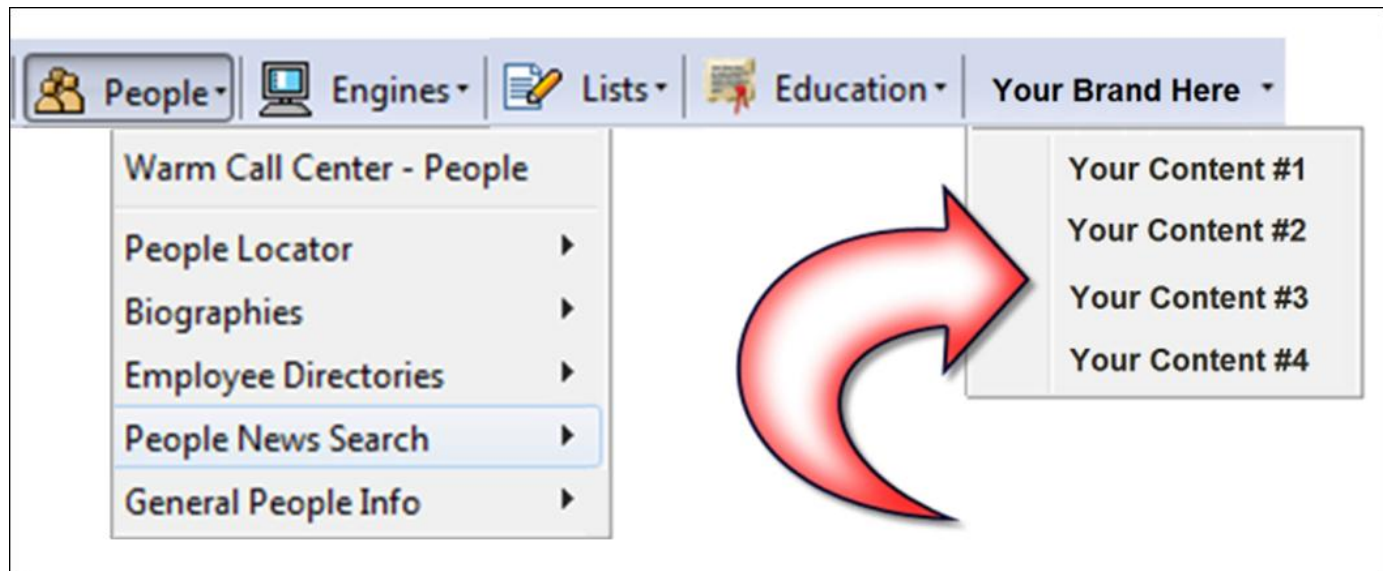
- **Your brand/logo embedded into the Toolbar application**
  - Seen EVERY TIME your advisor client is online
  - Custom Google search application with your brand/logo



# ActiFi Toolbar - Your Content

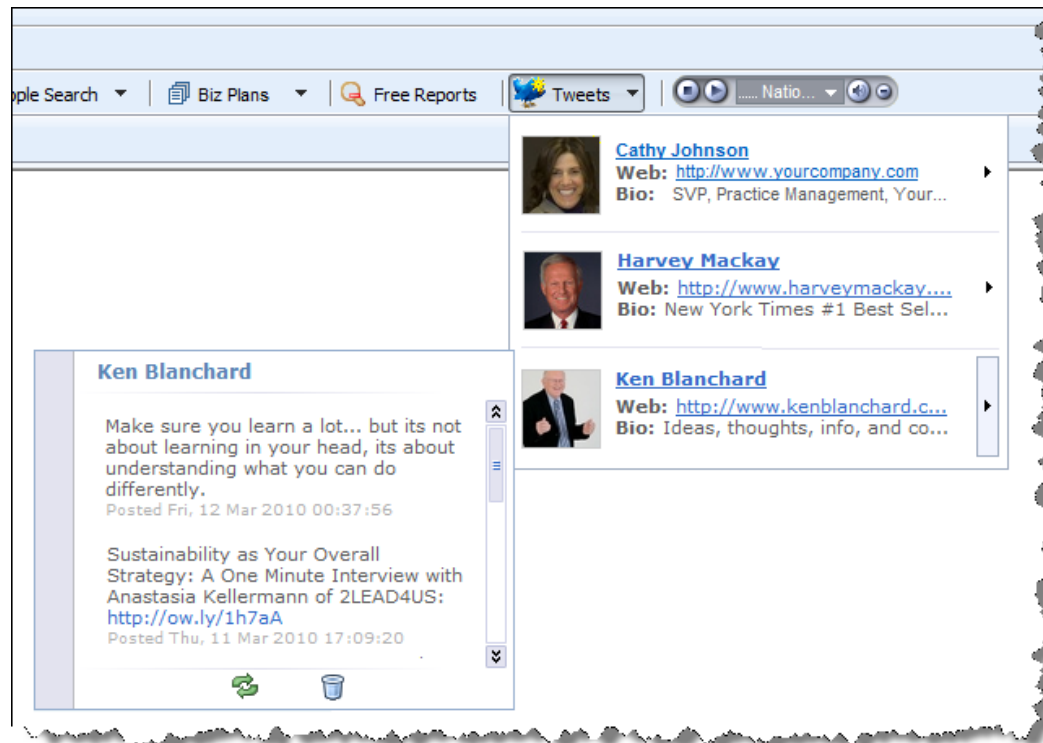
- **Direct links to your content, organized by category**

- Your Web site
- Third-party content sources
- Your internal article and research library
- Your Webinars
- Your product/service offerings

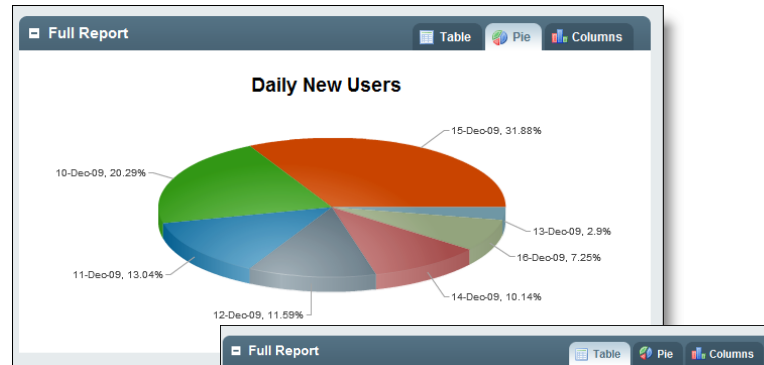


# ActiFi Toolbar - Your News and Updates

- **Real-time content feeds directly into the Toolbar**
  - Twitter feeds – Your feeds and your selected third parties
  - News feeds / RSS Feeds
  - Special offers
  - Audio/Video content direct through the Toolbar audio/video player



# ActiFi Usage Reports



Component	Usage (clicks)	% of Total	% Change	Usage (clicks)
	24,456	38.45%	-	
People	9,459	14.87%	-	
Company	8,216	12.92%	-	
Gadgets	6,519	10.25%	-	
Industry	3,554	5.59%	-	
Engineer	3,226	5.07%	-	
Tools	2,794	4.39%	-	
Web Call Center	1,723	2.71%	-	
	1,658	2.61%	-	
	1,174	1.85%	-	
	460	0.72%	-	
	365	0.57%	-	
	<b>63,604</b>	<b>100.00%</b>		

From: BusinessExpertWebinars@ConferTel.net  
To: sam@abrworldwide.com  
Cc:  
Subject: Never Have Another Cold Call! Survey Results

Date: Tuesday, August 25, 2009  
Time: 1:00PM(Eastern) /12:00PM(Central) /11:00AM(Mountain)  
Speaker/Host: Sam Richter

Registrants: 12  
Participated: 12  
Survey Responses: 5

Survey Date: 8/25/2009 11:05:17 AM

Quality of content	outstanding
Content matched the webinar description	outstanding
Presentation style	outstanding
Knowledge of speaker on the subject matter	outstanding
Telephonic service	outstanding
Online presentation technology	outstanding
Length of the webinar	outstanding
Process to find a webinar on BEW website	outstanding
Online registration process	outstanding
Overall experience	outstanding
Will you attend another webinar with this speaker?	yes
Would you recommend this webinar to a colleague?	yes
Would you recommend this speaker to a colleague?	yes

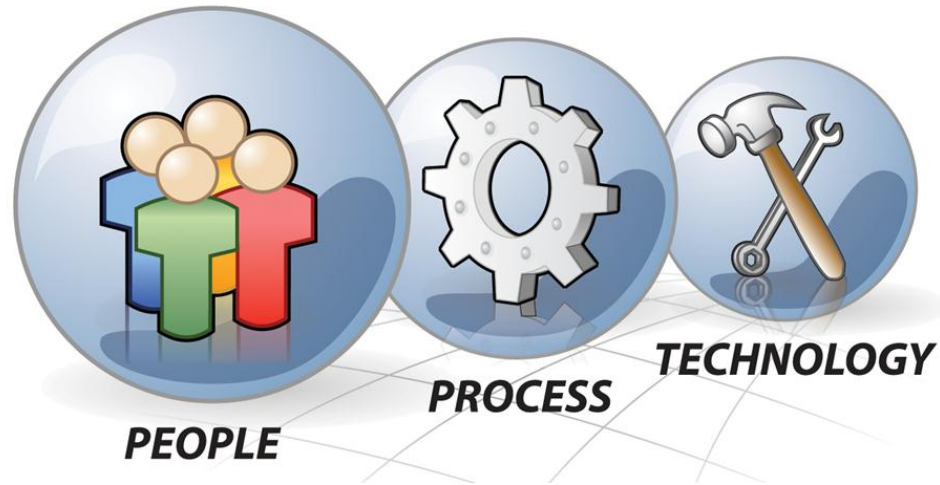
- In-person and Webinar surveys provide instant feedback on program value
- E-newsletter reports tell how many are read, and what stories are clicked on
- Toolbar usage is tracked anonymously
- Online reports provide instant feedback as to how often the Toolbar is used, what resources are most popular, etc.

# ActiFi What Financial Pros Think

- “I attended the program, read the book, and installed the Toolbar and am astonished at the amount of search power that is just a few more clicks away than the typical Google search.”  
– *George Clarke, Chief Financial Officer, U.S. Wealth Management, LLC*
- “The techniques taught to uncover information residing on the Web are amazing. You will be stunned at the amount of hidden information that can be found. This program has been invaluable in developing relationships and business activities.”  
– *Kent Dombal, Senior Vice President, Wells Real Estate Funds*
- “Dealing with both smaller private and larger public companies, and individuals, the *Know More!* program gave us some tools and tricks to learn more about our prospects than we ever could imagine. Very useful.”  
– *Arvid Povilaitis, Chief Operating Officer, Meritex*
- “*Know More!* is a goldmine of tips and tools that you can use instantly at your desk daily to raise the bar when it comes to approaching your prospects respectfully and intelligently.”  
– *Alan Geller, Managing Director, AG Barrington, Inc.*
- “*Know More! Client Relations* is practical and user friendly while at the same time fascinating for what it uncovers in the growing world of information.”  
– *William M. Rohde Jr., Acadia Insurance Company*
- “Sam's presentation featured some of the most eye-opening, mind-blowing techniques I have ever experienced in a high-content program. As they say: ‘You don't know what you don't know.’ Trust me. What Sam knows, you don't know.”  
– *David Avrin, The Avrin Group*

# ActiFi What Financial Pros Think

- “The key to value-added sales is meaningful relationships and the key to meaningful relationships is knowing your audience. *Know More!* nails it—you get the theory AND the tools and tips.”  
– Bruce Langer, *Tealwood Asset Management*
- “This is a dynamic reference tool for all sales people to research and cross-reference and compile their own qualified list of contacts. The program has done the heavy lifting and made it easy for the rest of us. It is scary how easy it is to gather info when you know where to look. This is a must-have for serious prospecting.”  
– Connie Guelich, President, *Guelich Capital Management LLC*
- “I have read more than 100 sales books during my 17 years as a professional salesperson. Out of the 100, I can point to 3 or 4 which made a difference in my career. This book just became one of them. This program teaches you how to prepare (research your prospects and suspects). You are guaranteed to profit from it.”  
– Daniel T. Vonlehmden, *Regional Director, Multi-Funds, Inc.*
- “This program is in the handful that I have ever recommended to other people that sell for a living. In your first sales call you will know more about your prospect than anyone who has ever called on that person before.”  
– Ric Lager, *President, Lager & Company, Inc.*
- “The time I take to research, investigate and gather information has been easily cut in half. It is simply incredible. I hesitate to share this book with my colleagues because I feel I have a great competitive edge.”  
– Doug Goodmundson, *Northwestern Mutual*
- “Because of *Know More!*, I am better prepared for meetings and spend more time asking “probing questions” that lead to uncovering real needs. I had a prospective client recently comment that they have never had anyone come to a meeting so prepared – and then we won the business!”  
– Jim Stelten, *Director Client Services/Business Development, KDV*



To learn more about Know More! Client Relations for your advisors and organization, please contact:

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**Inc. 5000**

Ranked the nation's 29<sup>th</sup> Fastest Growing Company in the Financial Services Sector by Inc. Magazine