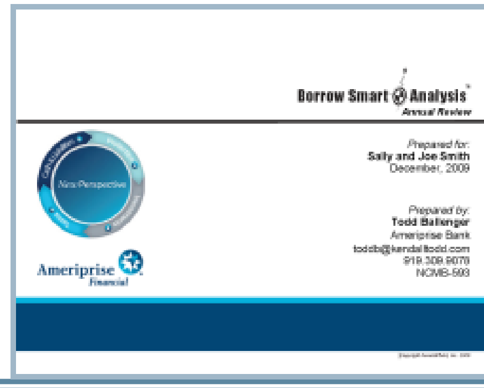
think smart
borrow smart

Borrow Smart Analysis

The SOFTWARE for Liability Management

ENTERPRISE EDITION



the Software –

An industry changing approach to providing a fast, easy, accurate way for a client to understand the value of learning how to manage assets and LIABILITIES. It's built the way people think, allowing your participating advisors to engage quickly. Interview over the phone, or in person, with simple questions and let our powerful advice engine provide customizable options. Behind the scenes a proprietary amortization engine runs up to four loan comparisons side-by-side. Dynamic sliders keep your field leaders focused on comparing what's important to the client. Once a recommendation is ready, it's 'what you see is what you get' as the dynamic report engine generates a custom presentation using only the information selected during the analysis. Our patented product templates provide your team with a truly unfair advantage in your market. The ability to integrate with any new or existing system makes the process easy for all parties.

the System –

Not just software, a patented 3-Step process [Interview, Analyze and Present]. Use a time tested step-by-step system for creating a highly visible, unmistakably valuable solution for your clients. The customizable interview form, the software, and the presentation engine all work together to create a unique client experience whether you deploy it in the field, or using a call center approach.

the Training –

Centralized or regional live in-person training is available, with daily support and weekly live web based coaching. Customized videos and custom experiences can be developed based on the enterprise long terms strategy, needs, and culture. We make it easy for all to understand how this transformational tool works to support the corporate mission. We'll provide best practices based on our 20 years of working to help advisors and specialists manage liabilities.

What's Included?

Software: Borrow Smart™ Software System - a complete liability management software tool for interactive client analysis and presentations, ongoing client management, and business development.

Training: Video based training program provides a 21-day habit forming engagement, with step-by-step instructions, examples, and 7 Practice Case Studies.

Content: Specialized content is built into the system, providing dynamic support 'on demand' as the plan is created. Additional content can be created and uploaded to provide additional tailored media.

Control: Executive login provides secure system wide controls over: logos, color schemes, disclosures, users, report language, report graphics, available user content, user access, and real time usage with up to 7 Levels of reporting and complete private label branding control.

Investment:

$1,000 per annual seat license
includes weekly updates and support.

Additional licenses may be added at any time.

Custom content creation and software modifications are available upon request for Enterprise Clients, including call center integration, custom reporting and work group development, automated reports, rate and product integration, and more.