

## Note-taking made easy.

### STREAMLINE YOUR NOTE-TAKING PROCESS

2/3 of our short term memory is lost *one hour* after our meetings.

90% of our client meeting information is lost after 24 hours.

Advisors Assistant has partnered with Mobile Assistant to provide an efficient, easy way for you to enter client notes directly into Advisors Assistant CRM.

### HOW DOES MOBILE DICTATION WORK?

After a client meeting call **Mobile Assistant** from your cell phone; state the client name and phone number, then speak your notes, impressions and next steps. A professional transcriptionist will type your message, email it back to you, and automatically post the report to the specified client in Advisors Assistant CRM.

### SECURITY

**Mobile Assistant** takes security and confidentiality seriously:

- HIPPA and Gramm - Leach - Bliley compliant.
- Mobile Assistant carries Cyber-Risk Insurance, which further protects our clients.
- Written Information Security Protocol (WISP)

### MOBILE ASSISTANT CLIENTS INCLUDE:

- TIAA - Cref
- The Standard
- Calamos
- CUNA Mutual Group
- TD Ameritrade
- John Hancock Financial Network - Approved Vendor

**“Using mobile dictation has increased the accuracy and effectiveness of my call reports while freeing up more of my day, and is a cannot do without tool.”**  
- Jeffrey, CFP®

### BENEFITS OF MOBILE ASSISTANT:

- **Reduce your note-taking** time with a simple phone call.
- **More accurate documentation** of client meeting notes by recording the information **immediately**.
- **Ensure compliance** with online activity tracking.
- **Easy implementation** - simply use your existing cell phone.
- **Increase efficiencies** by reducing the time spent typing your notes in Advisors Assistant CRM.
- **Same business day** turnaround.
- **No equipment to buy** - use any phone.
- **Flexibility** - this solution can be used anywhere, anytime.
- **Professional Quality Reports.**
  - 100% U.S. based Professional Transcriptionists.
  - Full time quality assurance staff.
  - No job length limit.



### Want to sign up for Mobile Assistant?

Go to [www.MobileAssistant.us](http://www.MobileAssistant.us) and enter 25% off coupon code **“ADVASSIST”** at checkout and enter your Outlook Email Address in the Profile Details for Advisors Assistant in the additional information section.

Advisors Assistant CRM has partnered with Mobile Assistant to offer this exclusive discount:

**\$54.37**/user monthly subscription  
**\$600**/user annual subscription