

**Spend 75% less time on forms  
and more time with your clients.**



**Take The Work  
Out Of Paperwork**

As a financial advisor, when you've earned your client's trust and the reward of opening a new account, completing the paperwork will be a snap with the Quik! Forms Library. With all your forms in one place and pre-populated with client and rep data, Quik! allows you and your staff to spend more time generating revenue.

"Quik! has given us exactly what we need: more time with our clients and professional forms right at our fingertips."

**- Jodi W.  
Client Services Rep**

The screenshot shows the Quik! Forms Library software interface. The title bar reads "Quik! Forms Library - Take The Work Out Of Paperwork". The menu bar includes "File", "Settings", "Tools", "Online", and "Help". The main window is divided into three steps: "Step 1 - Choose A Client", "Step 2 - Select Forms", and "Step 3 - Start Forms".

**Step 1 - Choose A Client**

Quik! The best forms solution

**Quik! forms library**

Get Updates

Client ☐ Spouse ☐ Joint - Both Spouses ☐  
(Optional Client - Choose a Client Relationship.)

Contact

Account

**Step 2 - Select Forms**

Form Groups - Choose a Group of Forms

New Group

Rep Info  Active Rep Name  Rep Number

Dealer	Category	Form Name	Description
<input type="checkbox"/> Alliance Capital	College Planning	529 College Fund Application	Use this form to start a new 529
<input type="checkbox"/> American Funds	Admin	Change of Dealer Authorization form	
<input type="checkbox"/> American Funds	Mutual Funds	American Funds Account Application	
<input type="checkbox"/> American Funds	Retirement Planning	Roth IRA Application	Also requires the Traditional IRA
<input type="checkbox"/> American Funds	Retirement Planning	Roth IRA Request for Conversion	
<input type="checkbox"/> American Funds	Retirement Planning	Roth IRA Transfer of Assets	Direct Rollover Form
<input type="checkbox"/> American Funds	Retirement Planning	Traditional IRA and Roth IRA Trust Agreement	Must give client with each IRA
<input type="checkbox"/> American Funds	Retirement Planning	Traditional IRA Application	Also requires the Traditional IRA
<input type="checkbox"/> American Funds	Retirement Planning	Traditional IRA Transfer of Assets	Direct Rollover Form
<input type="checkbox"/> Financial Network Investment Corp	Admin	ACH Credit Auth Agreement	
<input type="checkbox"/> Financial Network Investment Corp	Retirement Planning	ACH Debit Auth Agreement IRA Accts Only	IRA Accts Only
<input type="checkbox"/> Financial Network Investment Corp	Admin	ACH Debit Auth Agreement Retail Accts Only	Retail Accts Only
<input type="checkbox"/> Financial Network Investment Corp	Admin	Advertising Compliance	All advertising or marketing mat

Select All Unselect All

Keyword Search (for forms)  Search 38 forms found. Reset

**Step 3 - Start Forms**

START! ☐ Create Client Report

Exit

Status 3/25/2003 6:41 PM

To learn more, visit [www.quikforms.com](http://www.quikforms.com)

# The easiest way to automate forms is...



"The great thing about Quik! is having all my forms in one place - no more searching websites, calling dealers or looking through my files in the office... I just open Quik!, choose a client and start my forms."

- Trish G., *Financial Advisor Assistant*

"Filling out forms is so much easier with the Quik! Forms Library. And with a direct connection to my database, I know the client data on the forms is up to date. Using this software is a real time saver for our office."

- Steve L. *Financial Planner*

## Features...

### Library Of Fillable Forms

Imagine finding all the forms you need in one place... Use the Quik! Forms Library to find your broker/dealer, clearinghouse, mutual fund and insurance forms pre-populated and ready to print.

### Automated Update Service

Once you find and subscribe to the forms you want, keeping them up-to-date is automatic... simply run the Quik! Update Service and the latest forms will be downloaded and installed.

### Connected To Your Database

With a dynamic link to your database, the FULL version of Quik! reads your client data and automatically fills out your forms for you.

### More...

For more information visit [www.quikforms.com](http://www.quikforms.com)

## Benefits...

- ☒ Spend More Time With Clients
- ☒ Dramatically Reduce Data Entry
- ☒ Reduce Processing Errors
- ☒ Easy To Learn, Easy To Use
- ☒ Professional, Accurate Forms
- ☒ Priced Per Rep, Unlimited Users

## Supported Databases...

ACT!, ACT4Advisors, Advisors Assistant, BrokersACT, dbCAMS+, EZ-Data CDS, Goldmine, Gorilla, Junxure-I, Outlook, Quik! Database, WealthSpring, Text Files, More...

© Copyright 2004 Efficient Technology Inc, All Rights Reserved.  
All trademarks are the property of their respective owners.

For more information, call (909) 624-7988  
or send an email to [info@etiforms.com](mailto:info@etiforms.com).

[www.quikforms.com](http://www.quikforms.com)

