



Transition Reps To Your Firm In 85% Less Time.

Introducing the Quik! Transition System...

Combining the best in database and Adobe® Acrobat® technology, the Quik! Transition System will enable you to pre-populate all the paperwork needed to transition a rep to your firm in less time than any other method.

Now reps won't think twice about switching broker/dealers.

*"We owe so much of our success to you...
We wouldn't be where we are today without
the Quik! Transition System."*

- Ken Johnston and Susan Woltman
Girard Securities, Inc

*"Quik! is a great product and I would let
anyone know about my experience working
with both the software and the Quik! team."*

- Liz Rivera, Transitions Operations
NFP Securities, Inc

A better way to transition reps is only a page away...

How To Perform A Quik! Transition:

Step 1: Import Data

▶ Import a variety of files types...

Importing client data is easy using Quik! to read text and database files or import a Quik! Forms Library export. Or give reps our automated Microsoft Excel® template file to help them prepare their data.

Step 2: Assign Forms

▶ Assign forms in a few clicks...

Use the Quik! Transition System to assign multiple forms to an account in just a few clicks. By selecting a clearing firm, custodian type and account type, an entire set of forms are instantly assigned. Or, let your reps make the account assignments in the Excel template to save even more time.

Step 3: Create Forms

▶ Create 100's of forms per hour...

When you're done assigning forms, start the Quik! Merge Program to automatically create, combine and pre-populate all the transition paperwork at once. Simply click the start button and walk away... Quik! will take care of the rest.

Step 4: Print or Send

▶ Acrobat® forms are ideal...

Since all your forms are built in Adobe® Acrobat® format, you can put them on a CD and send them to your rep to finish online, print and sign. Or, use the Quik! Merge Program to print all of the forms in batch mode to a dedicated printer.



Benefits...

- ☒ ROI In Two Months Or Less!
- ☒ Recruit Reps More Easily
- ☒ Reduce Processing Errors
- ☒ Easy To Learn, Easy To Use
- ☒ Professional, Accurate Forms
- ☒ A Better Transition Process

System Requirements...

Win98® or higher, Access® 2000 or higher, Acrobat 5.0 Full Version or higher

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

www.quikforms.com

