



# The handwriting is on your forms.

## What do your forms say about your company?

Everything. Your financial advisors work hard to gain their client's trust, and then they ask the client to sign a handwritten form? This may be your only chance to make a great impression with your client and your rep. That's why you need Quik! - the perfect forms automation platform to produce professional forms in up to 75% less time.

## The only handwriting on your forms should be the signature.

*"Filling out forms by hand is the last thing I want to do. Now that I have Quik!, I can complete forms before or even during my client meetings."*

- Matt D  
Financial Planner

A better way to complete forms is only a page away...

# Join The Forms Alliance With...



Take The Work Out Of Paperwork™

You're invited to join an alliance of the top financial and technology firms in our industry. With your forms and our technology alliances, we will deliver secure, automated, fillable forms to your financial advisors at no cost to you.

"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

## We will automate your forms for free.

### A Forms Alliance Is...

#### ▶ An Online Library Of Forms

Imagine finding all the forms you need in one place... Reps can use Quik! to find ready-to-print, fillable and automated broker/dealer, clearinghouse, mutual fund and insurance forms.

#### ▶ An Automated Update Service

Once a rep finds and subscribes to the forms they use, keeping them up-to-date is automatic... simply run the Quik! Update Service and the latest forms will be automatically downloaded and installed.

#### ▶ Pre-Populated Forms

Advisors who use the the Quik! Forms Library can pre-populate their forms with rep, broker/dealer and client data read directly from their client database.

#### ▶ More...

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

### Alliance Benefits...

- ☒ Most Forms Are Built For Free
- ☒ Send Form Updates Automatically
- ☒ Host Fillable Forms On Your Site
- ☒ Make It Easier To Do Business
- ☒ Quik! Platform Ensures Security
- ☒ Save Your Reps Time And Effort

**Make Your Forms Quik!**  
Your reps will thank you for it.

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

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





Take The Work Out Of Paperwork™

# Application to join the Financial Industry Forms Alliance

Please fill out the information below to join the Financial Industry Forms Alliance.

## Company Info

Company \_\_\_\_\_ Phone \_\_\_\_\_  
Address \_\_\_\_\_ Website \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

## Main Contact Person For Forms Alliance

Name \_\_\_\_\_ Phone \_\_\_\_\_  
Email \_\_\_\_\_ Fax \_\_\_\_\_

## Second Contact Person (optional)

Name \_\_\_\_\_ Phone \_\_\_\_\_  
Email \_\_\_\_\_ Fax \_\_\_\_\_

## Type of Company (check all that apply)

☐ Broker/Dealer ☐ Clearinghouse ☐ Mutual Fund ☐ Insurance ☐ Other \_\_\_\_\_

How many reps rely on your forms to transact business? \_\_\_\_\_

Do you currently offer fillable forms on your intranet? ☐ YES ☐ NO

☐ **Yes! Please sign me up for the Financial Industry Forms Alliance.**

**Free Membership (\$2,500+ value) –** Your top forms ready to be filled out online

- Forms are professionally automated in Adobe® Acrobat®
- Forms are setup and maintained for your reps to access from your intranet
- Forms are 128-bit secured and adhere to Quik!'s high-quality forms standards
- Your reps will be able to find, download and automate all their forms using Quik! (www.quikforms.com)

Signature \_\_\_\_\_

Date \_\_\_\_\_

Please complete, sign, date and send your completed form in one of the following ways (Attn: Forms Alliance):

Email: [alliances@etiforms.com](mailto:alliances@etiforms.com)

Mail: 175 Meredith Street, Claremont, CA 91711

Fax: (310) 388-1256

Phone: (909) 624-7988