

Firm-wide Enterprise Deluxe



Firm-wide Enterprise Deluxe is designed for firms looking to provide a unified look and shared resources across the entire firm. This option provides a custom white-labeled solution for a single enterprise at a reduced rate for firms with multiple advisors operating under a single brand.

Benefits:

- Standardize quality of advice among the advisors on the team
- Position your team as the expert to your clients, prospects, and centers of influence
- Enhance efficiency in the planning process
- Educate younger advisors as a training tool

Features:

- Flowcharts can be white-labeled to match your firm's or advisor team's brand (Add your firm's logo, then select your preferred color palette from a range of available options)
- Firm-wide license. The entire firm must join
- Add more firm information, and any additional required information, disclaimers, or other compliance disclosures if needed, to the back page of each flowchart page
- Reproduction rights to share flowcharts digitally via social media or on the advisor's website
- Firm-level administrator privileges to manage advisor access (add or remove advisors, set firm-wide branding, and personalize the flowcharts for each advisor, with one consolidated invoice)
- Billed annually on credit card or invoice based on the pricing structure described below:

Pricing (paid by enterprise):

Number of Advisors in the firm	Up to 5	Up to 20	Up to 100	Up to 250	Up to 500	500+
Base Fee	\$950 per year	\$2,950 per year	\$12,450 per year	\$24,950 per year	\$39,950 per year	Negotiable

Additional licenses can be purchased for \$299 per year if needed instead of moving up to the next tier. For example, if you have 6 advisors, the cost would be \$1,249 (\$950 for 5 advisors, plus \$299 for the sixth advisor).