



#1 Best-Selling Contact & Customer Manager



Get it together

Think of Act! as your business 'command center,' giving you control to quickly tap into all relationship details, seamlessly interact with productivity and tools you rely on every day, and take the guesswork out of when, where and how to engage with prospects and clients – all from within Act!.

Contact	Mailing Address	Status
Contact	Address 1	ID/Status
Salutation	Address 2	Client Number
Phone	City	Location / Branch
Mobile	State/ZIP	Services
Alt. Phone	Country	Tier
Home Phone	Company	Referred By
Fax	Company	Record Manager
E-mail	Title	Watch List
Birth Date	Department	Days Since
SSN	Web Site	Client Review
Marital Status	Contact Method	Key Words
Relationships	Best / Time	Important Note
Secondary Contacts	Marketing	

TIP: Link Householding on the Relationships Tab
TIP: Enter Other Advisors on the Secondary Contacts Tab

Social Updates | actplatinum.com | Contact Access | User Fields | Timeline | Marketing Results

History | Activities | Personal | Profile | Planning | Policies | AUM | Other | Opportunities | Documents | Notes | Secondary Contacts | Relationships | Groups/Companies | Web Info

Investment	Retirement	Estate
Objective	Age	Will In Place
Risk	Distribution	Trust
Type	Spouse Age	Date
Timeframe	Distribution	Type
Rate of Return	Ret Savings	Trustee
Investment \$	Income Goal	Beneficiary
Details	Details	Details



Act!'s Great Features Plus

- Know every detail about your clients and business associates.
- Track accounts under management, other assets and policies.
- Identify planning options for investment, retirement and estate.
- Use opportunities to bring other assets in-house or additional investments for your pipeline.
- Use groups to monitor seminar success including participation, details and results.
- Grow your business with the included Act! basic emarketing account.
- Stay connected with Windows, Web & Mobile - Hosted options available!



Still the one

Act! is the #1 best-selling Contact & Customer Manager, trusted by individuals, businesses, and teams for over 25 years, because it's affordable, easy to use and purpose-built to meet your unique, evolving needs. Act! helps organize all your prospect and client details in one place and market your products and services more effectively, driving results while creating customers for life.

Act! Licenses Sold Separately

