

**CopyTalk** LOGIN | HOME | CHAT | CONTACT

PRODUCTS INDUSTRIES COMPANY NEWS PARTNERS SUPPORT

**Mobile Scribe Documentation Services for the Professional on the Go**

**FEATURES & BENEFITS**

Dictate from any telephone. At home, in the office, or while on the run. Nothing else to buy - Turn your cell phone into the perfect dictation device. Saves you and your assistant valuable time - Spend more time servicing your clients.

**MOBILE SCRIBE - WHEREVER YOU GO**

With unlimited dictations per user for a low monthly fee, Mobile Scribe encourages you to document more often and in more detail. With a 97% retention rate, we don't need to receive any long-term contracts, you can cancel at any time. For more specific benefits to your field, check out our industries.

**EASY AS 1, 2, 3:**

1. Dial CopyTalk from any phone and dictate.
2. CopyTalk transforms voice into text and delivers it back to you within a few hours.
3. Text can be easily copied into any database or be printed for your files.

\$79.95 per month

- Up to 4 minutes per topic
- Unlimited number of dictations per user
- Same day turnaround
- Transcriptions automatically emailed to you and/or four other specified addresses, or available through secure download
- Privacy friendly - no client-identifying information is seen by transcribers
- Risk Free - Cancel Any Time

**TRY COPYTALK TODAY WITH ONE OF THESE GREAT OFFERS**

**ABSOLUTELY FREE TRIAL**  
7 WEEKS FREE WITH TRIAL \$16.25 VALUE

**SUBSCRIBE TODAY**  
GET ONE MONTH FREE \$79.95 VALUE

Other products: Suite Mobility, Digscribe

For more information, please contact an account representative at (866) 257-8825 or [sales@copytalk.com](mailto:sales@copytalk.com)

## Client management tool

For the past two years, more than half our production has been generated through repeat business with our existing client base. While technology is never a silver bullet, our E-Z Data software has played an important role in our success. It is our primary tool for building relationships with our clients. It supports our back-to-basics approach to the business, and it makes a huge difference in our ability to reach out to the right clients at the right time to drive new sales.

**E-Z DATA** ONE Solution for Insurance and Financial Services

Home Products & Solutions Client Success Partners Company Training & Support

SmartOffice Login

**SmartOffice**  
Take the next step.

**CONTACT E-Z DATA TODAY**

Click here for more information or call us at **800-777-9188**

**SIGN UP FOR A WEB DEMO**

October 6, '08	11:00am PST (closed)
October 15, '08	11:00am PST (closed)
October 22, '08	11:00am PST (closed)
October 29, '08	11:00am PST (closed)

CANADIAN Demo [Link Here!](#)

**SMARTOFFICE\***

**Solutions for Your Business**

E-Z Data's web based SmartOffice solution is the industry's most trusted software solution for CRM, practice, and agency management.

SmartOffice is packed with ways to help you:

- reduce paperwork
- ensure compliance
- deliver excellent client service

Save time and make more money. Choose the SmartOffice solution for your business and get started now.

[Learn more about SmartOffice](#)

**CHOOSE AN INDUSTRY SOLUTION**

- INSURANCE AGENTS
- FINANCIAL ADVISORS
- BROKERAGE/GENERAL AGENCY
- ENTERPRISE SOLUTIONS

It supports our back-to-basics approach to the business, and it makes a huge difference in our ability to reach out to the right clients at the right time to drive new sales.

E-Z Data makes delivering that level of service easy. We use the system to touch every client multiple times a year, but not to sell them anything. We send three newsletters, a pre-tax IRA reminder, a postcard reminder for every contract anniversary, a holiday card and then the birthday call. That may sound like too much to handle, but every outreach is supported by E-Z Data. It takes us only 20 seconds to run an "important dates" posting to pull the birthdays each month, and they're automatically posted to my Outlook calendar. The biggest advantage is that, when the time comes to place an actual sales call, the client doesn't feel like I'm calling out of the blue.

We're in tough economic times, so business has been slow. To market in this environment, we use E-Z Data to identify the clients who would be most receptive at this time. E-Z Data made this task simple. It also allowed us to use the system to place just five calls a day on our task list from the 600 identified prospects to keep us focused without being overwhelmed by the campaign. More information is available at [www.ez-data.com](http://www.ez-data.com).

Submitted by **Ari Horowitz, LUTCF, CLTC**, a seven-year MDRT member from Morganville, New Jersey

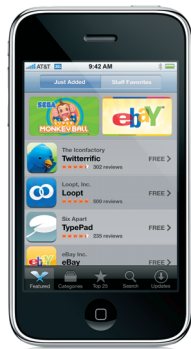
## Quick meeting follow-up

Many of us have used CopyTalk to record notes of our client meetings. I take that one step further. I've found that this telephone transcription service is also great for composing my follow-up e-mails or letters to clients.

After I leave my client meeting, I call CopyTalk. I record my thoughts about the meeting — what we discussed, any decisions we made and the follow-up needed. I send this to my administrative staff to clean up the message and send it off to the client as a recap of our meeting. I am sure to include specifics as to which staff members will handle each of the tasks so my clients know who to communicate with. Within a few hours of my meeting, I receive the transcript of my meeting notes, and my e-mail message is ready to go. Simple and effective!

For more information on the CopyTalk service, visit [www.copytalk.com](http://www.copytalk.com).

Submitted by **Sarah J. Kaelberer, CFP, ChFC**, an eight-year MDRT member from Wayzata, Minnesota



## Ringing up an education

Want to brush up on languages, astronomy or the atom? Now you can do it with your phone. New educational iPhone applications make flash card programs, visual aids and e-books available to anyone who wants to learn. They're available at the "App Store" through Apple's iTunes. Prices range from free to about \$40. **RTT**