



Allen Marketing & Associates, Inc.

Your Insurance & Financial Gatekeeper for the 21st Century

Are you an insurance professional who is just making sales or one who is building clientele and a book of business?

Let us help you grow your clientele and **manage** your book of business. Can your current back office support do that?

We didn't think so...

We have designed this database with you in mind.

Need a calendar to keep track of appointments? **Got It!**

Need quick access to client information? **Got It!**

Need to keep track of all client communication? **Got It!**

Need to keep track of all assets of your clients? **Got It!**

Need to track your clients medical conditions for life insurance? **Got It!**

Need to keep track of all your production? **Got It!**

Need to keep track of client referrals? **Got It!**

Need to generate birthday and anniversary lists to mail out cards? **Got It!**

Need to be reminded to call clients on specific days? **Got That Too!**

And so much more!

This database provides everything you need to prepare yourself for a complete job of planning with your client for a low cost!

Two Options

For the low cost of \$695.00 and then \$99.00 per year after that covers the maintenance contract. This also covers a training session with you on what the database can do and how you input all of the information on your clients.

For the low cost of \$695.00 and then \$250.00 per year after that covers the maintenance contract along with your system backing up on our in-house server. We will also input the case notes on any new business that you have pending for your viewing automatically.

**Call Ashleigh Fittro today for more information at
800.877.6589**