

MobileAssistant™

Talk, Don't Type

THE IMPACT OF THE ELEPHANT

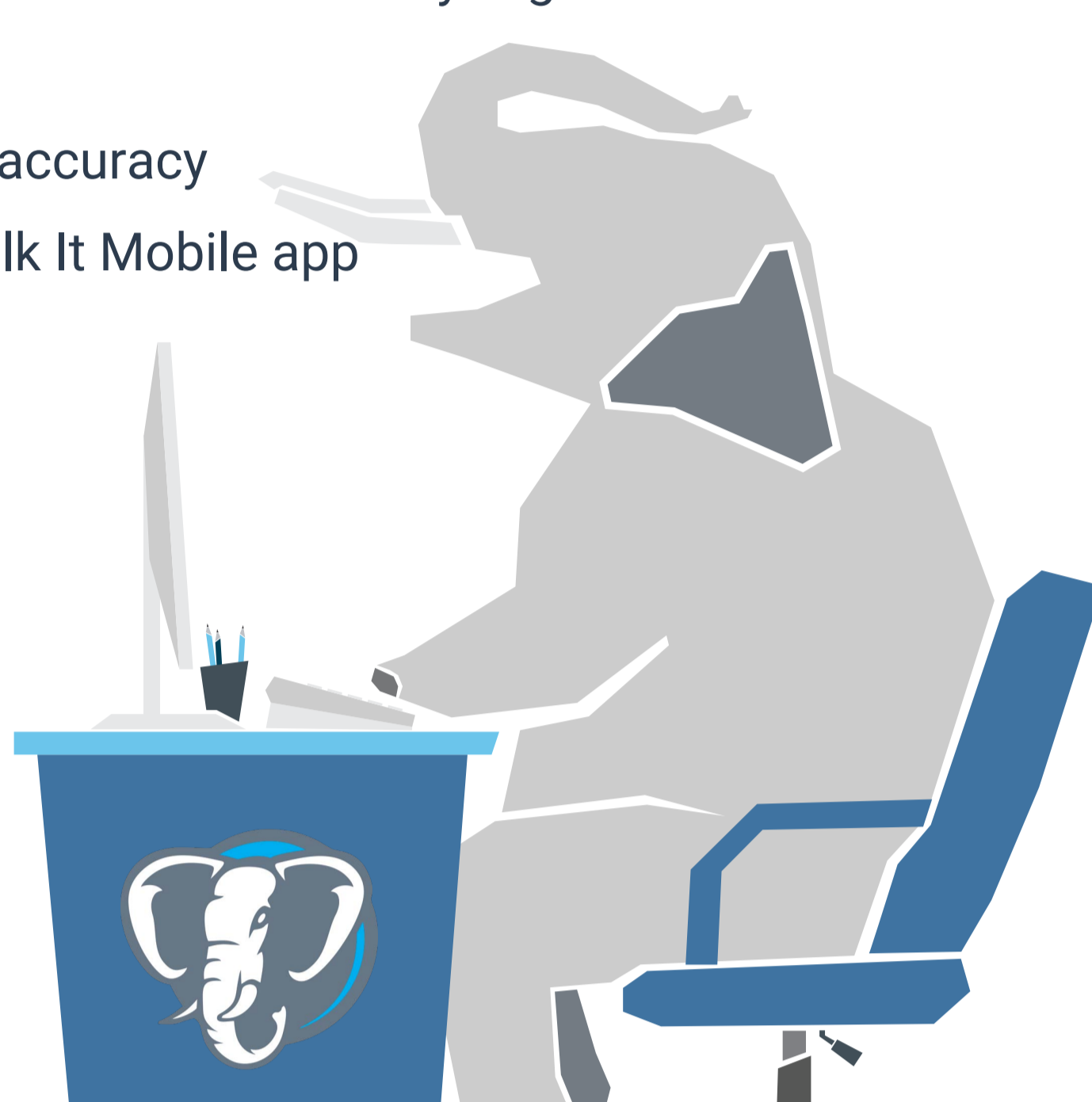
THE PROBLEM

After client meetings, how to accurately capture and document the details efficiently & accurately.

THE MOBILE ASSISTANT SOLUTION

Meet with your Client - Speak your Notes - Delivered within 8 bus hours

- Easily capture meeting details – 2/3 of our short term memory is gone after 24 hours!
- Easy adoption with immediate impact
- Human, US-based transcriptionists ensure accuracy
- Mobile, secure access to view notes via Talk It Mobile app
- DOL & compliance documentation benefits
- More detailed notes = more opportunities
- Built-in **Assistant** template guide



WHY USE MOBILE ASSISTANT?

- **More organized & prepared** to understand client needs
- Better documentation to **meet compliance requirements**
- **Time per week saved** by not typing
- The built-in **Assistant** helps capture structured, detailed notes

TIME SAVINGS

- NO TYPING
- NO EDITING INACCURATE NOTES
- ACCESS PREVIOUS MEETING NOTES QUICKLY

MOBILE ASSISTANT BENEFITS

PROTECTION & OPPORTUNITIES

- MORE DETAILED MEETING NOTES
- MORE ACCURATE MEETING NOTES
- IDENTIFY MORE OPPORTUNITIES
- STREAMLINE YOUR NOTE TAKING PROCESS



ADOPTION IMPACT 2017 Case Study

Reps that use Mobile Assistant VS non users for meeting notes

\$397,000 MORE

Asset Growth Per Advisor

\$9 Million vs \$7 Million

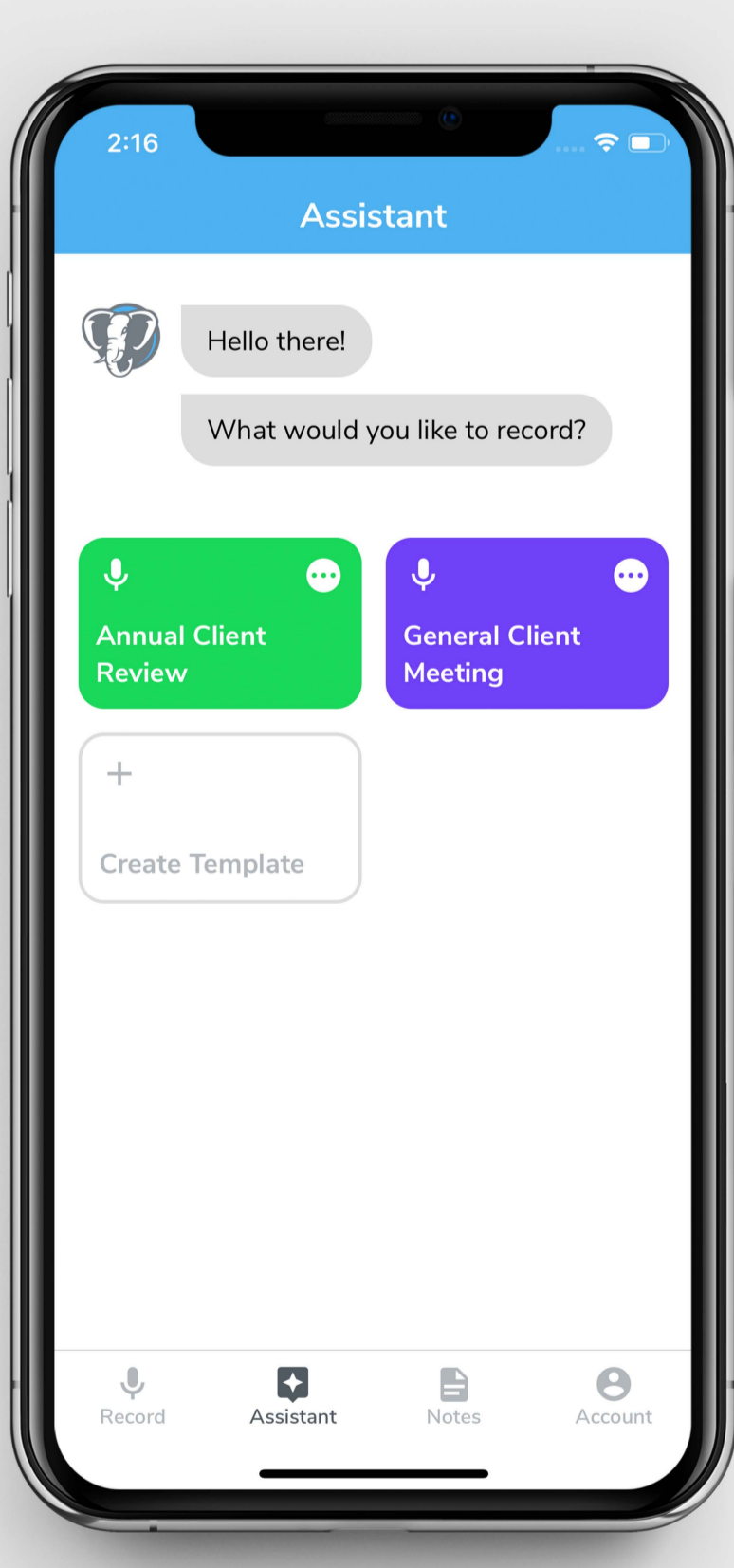
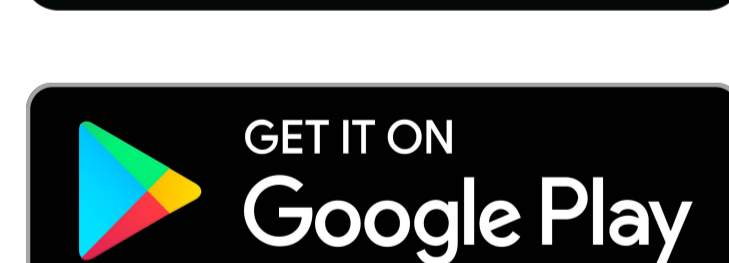
Asset Growth (new reps)

- Efficient & Frequent Adopters
- Infrequent Adopters

Mobile Assistant Features:

- Talk It Mobile app for IOS & Android
- The built-in **Assistant** template guide
- Searchable Notes section
- Multiple email delivery options
- US-Based human, professional accuracy
- 24/7 Access

Download the Talk It Mobile app



Meet your new **Assistant**

Meet your new Assistant

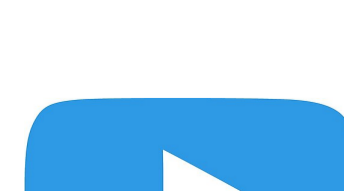
The built-in Assistant provides stepping stones to help guide you through the dictation process:

1. Open Talk It, then click the Assistant in the menu bar. Select a template or create a new one.
2. Speak your notes as you scroll through the list of questions (be sure to say the questions aloud so our transcriptionists know where you'd like your dictation entered).
3. Submit your dictation, then your note will be delivered; the dictation entered after each Assistant template question so your notes are structured and organized.



Talk It
by MobileAssistant

Watch our **Talk It** Mobile app demo here



Free Trial at www.mobileassistant.us

Discount Code: CARSON

QUESTIONS?

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