

ADVISORS
ASSISTANT[®]

MOBILE
ASSISTANT[™]

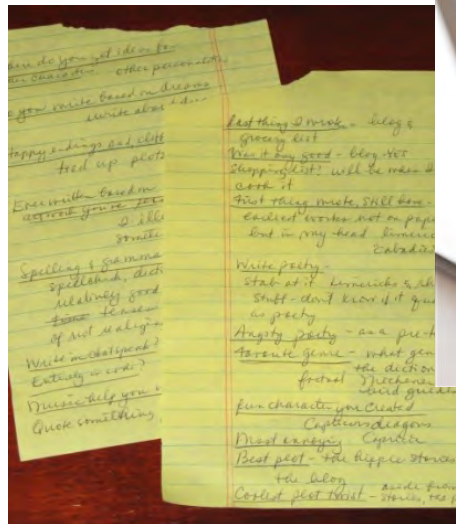
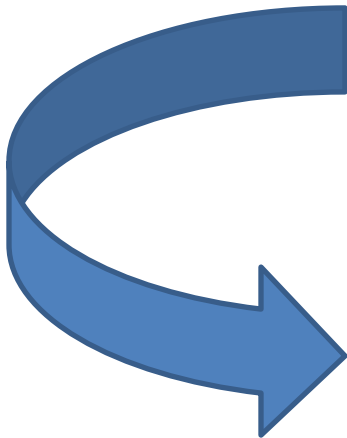
Talk, Don't Type.

THE EASY AND SECURE WAY TO CREATE ACCURATE, DETAILED NOTES

ADVISORS
ASSISTANT[®]

**ENDORSED
& INTEGRATED**

Client Meetings – how do you retain this important information?



Benefits of Mobile Dictation

Easy to implement

Efficient

Integrated with  **ADVISORS**
ASSISTANT[®]

Inexpensive

How do you get these client notes
into **Advisors Assistant CRM?**



How Mobile Assistant Works



Call Mobile Assistant
from any phone...



Speak your
notes...



Your notes appear
in your Inbox



Your notes post to
Advisors Assistant
CRM!

1. Call Mobile Assistant
2. Spell the client name
3. Speak the telephone number for the client
4. Speak your notes, impressions, next steps
5. Your transcribed note is emailed and automatically posts to the client record in **Advisors Assistant CRM.**

WHY



Professional Accuracy

HIPAA Compliant Security

8 Business Hour Turnaround Time

Template utility available

Fully integrated with  **ADVISORS**
ASSISTANTSM

iPhone App, TALK IT included





Introducing...

TALK IT By Mobile Assistant

Talk, Don't Type



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Great App! It's too Easy!! ★★★★★

by JMWeisner – Apr 24, 2013

The mobile app is so easy to use yet you have all the functionality. I love how it also connects straight into Redtail flawlessly and that on your mobile app you see a history as well. Love the app!

Financial Advisor ★★★★★

by ECnKC – Apr 24, 2013

Wow! This is the absolute best way to dictate notes from any of my meetings, activity or ideas. Live, intelligent people complete all of the transcription, accurately, with a follow up email and a ready reference note in the Talk It app on both my I Phone and iPad as well as my database. This is a must for client history and my practice.

Network ★★★★★

by TFSN CA – Apr 23, 2013

Great App and great integration with Redtail CRM. I have worked with Mobile Assistant for a while and their delivery and support is 2nd to none.



00:00:00



Press the microphone to start recording your notes



Press to review your note



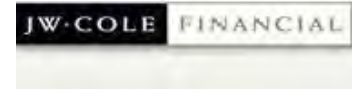
Press to submit your note

Subject	John and Susan Smith...
Job	1142013
Date	1/14/2013 2:23 PM

Transcription

Contact Name: MobileAssistant
 Summary appointment notes and work items for John and Susan Smith. Today January 14, 2013, met with John and Susan Smith in the office to go over the plan of action that came about due to financial calculations and planning that we had talked about. As far as the plan of action is concerned pretty much implemented everything that was proposed.

Mobile Assistant is approved and endorsed as a best practice at these organizations:





Talk, Don't Type
Easily Create Accurate Detailed Notes

Sign up for a **FREE TRIAL** at

www.MobileAssistant.us

Or call us at **888-373-1916**