

<i>Family Office Resources</i>		<i>Descriptions of 40 Resources</i>	<i>Virtual Adviser for \$500/Month. (\$250/month first year or \$100/month for QA3)</i>	<i>Allied Adviser Resources for \$1,000/Month</i>	<i>Channel Member Resources for \$5,000/Month</i>
<i>Adviser Marketing Products and Services</i>	1)	Custom Presentation Materials Package	8 basic plans	20 customized plans	100+ customized sample plans
	2)	Strategy Flyers	Non-customized, web-based	Limited Customization, web-based or hard copy	Unlimited customization
	3)	One Minute Adviser Video Program	Not available	Limited Customization, web-based or hard copy	100+ script available
	4)	Client Brochures	Non-customized, web-based	Limited Customization, web-based or hard copy	Unlimited customization
	5)	“Soft Data” Questionnaires	Non-customized, web-based	Limited Customization, web-based or hard copy	Unlimited customization
	6)	“Hard Data” Fact-finders	Non-customized, web-based	Limited Customization, web-based or hard copy	Unlimited customization
	7)	Client Engagement Brochures	Not available	Limited Customization, web-based or hard copy	Unlimited customization
	8)	Sales Webinars to Help Engage Clients	Not Available	\$4,000 day; \$400/hour	\$3,000/day; \$300/hour; 1 free webinar per month
	9)	vBlueprint Online Strategy Illustrator	Unlimited Access	Unlimited Access	Unlimited Access
	10)	Allied Adviser Marketing Webinars	Not available	\$400/hour	2 Per Month Included
<i>Adviser Training</i>	11)	Best Practices Workshop	\$500/Day	\$250/Day	Included
	12)	Best Tools Workshop	\$500/Day	\$250/Day	Included
	13)	Best Portfolios Workshop	\$500/Day	\$250/Day	Included
	14)	Best Legacy Workshop	\$500/Day	\$250/Day	Included
	15)	Live Technical Webinars	Included	Included	Included
	16)	Channel Adviser Study Group	\$500/Day	\$250/Day	Included
	17)	Newsletters	Not available	Non-customized	Unlimited customization
	18)	Recorded video library	Included	Included	Included
	19)	Coaching	Not included	Included	Included
<i>Advise Case Planning</i>	20)	Opportunity Conversations	(Access thru AA or CM)	\$300	1 per month included
	21)	Tactical Plans \$1000 - \$5000 value)	(Access thru AA or CM)	\$500-\$3,500	\$500-\$3,500
	22)	Comprehensive Plans	(Access thru AA or CM)	\$8,000-30,000	\$8,000-30,000
	23)	Summary Blueprints (2)	(Access thru AA or CM)	\$5,000-10,000	\$5,000-10,000
	24)	Family Retreat and Wealth Statement (\$3500 value)	Free with web-based software	Free with web-based software	Free with web-based software
	25)	Financial Check-up (\$3500 value)	Free with web-based software	Free with web-based software	Free with web-based software
	26)	Value Proposition Letter (\$1000 value)	Free with web-based software	Free with web-based software	Free with web-based software
<i>Adviser Rights</i>	27)	Downline Adviser Program	Not included	Sign up Virtual Advisers	Sign up Virtual Advisers plus 6 Allied Advisers: CPAs, JDs, etc.
	28)	Semi-Exclusive Territory	Not included	Negotiated	Included
	29)	Transferable Membership	Not included	Not included	Included
<i>Adviser Tech.</i>	30)	Custom Web Site	Not available	Call	\$1,000/yr
	31)	Deliverables Link	Not included	Not included	Included
	32)	Best Practices Documents	Limited availability	Some can be customized	100% can be customized
	33)	Login for vTasker case tracking	Only for active cases	Included for 20+ clients	Included for 100+ clients
	34)	Login for vBlueprint.com software	Included	Included	Included
	<i>Charity Board Resources</i>	35)	Custom strategic development plan	Not available	Included
36)		Custom website to track expected gift revenue	Not available	Can be licensed	Included
37)		Guidance in developing a planned giving committee	(Access thru AA or CM)	Custom coaching available	Included
38)		Custom videos for donors	(Access thru AA or CM)	Can be licensed	Included
39)		Custom brochures for donors	(Access thru AA or CM)	Can be licensed	Included
40)		Custom training workshops for donors	(Access thru AA or CM)	Can be licensed	Included

The above list of resources subject to change without notice until the Channel Member and/or Allied Adviser Agreement is signed. Please call 800-447-7090 or email info@vfos.com for details.