

M.J. Smith & Associates

GETTING ORGANIZED AND MAKING MORE MONEY WITH THE HELP OF CLIENT DATA SYSTEM

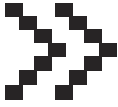
Mark J. Smith, founder and president of M.J. Smith & Associates, knows what it takes to drive an advisory practice to the top. A top producer for Raymond James for the past 20 years, Smith attributes at least a portion of his success to the value provided by Client Data System® (CDS), E-Z Data's Windows®-based practice management solution. "For more than 10 years, CDS has consistently given us the power to make our office extremely efficient," says Smith. "By eliminating a huge portion of paperwork and administrative tasks, CDS gives my team more time to focus on our most important priority: building strong relationships with our clients."

The value CDS provides is not limited to the basic contact management capabilities found in generic solutions. According to Brian Eilers, Operations Manager and a Principal of M.J. Smith & Associates, "CDS is very comprehensive, reaching into many areas of our business. It consolidates all of our client data into one program, and then, with the click of a button, we can get information on all of their investments — including rates of returns on both a time-weighted and dollar-weighted basis. Nothing else out there can give us this level of functionality." To gain access to investment information, the firm leverages a direct CDS download provided by Raymond James, coupled with the CDS Transaction Download module to obtain data from DST on variable annuities. The combination of the two makes it easy to analyze each client's portfolio and generate bound reports that include rates of return for one year, three years, or from inception date in a matter of minutes, all from within CDS. And for higher net worth clients, the data export function can be used to move CDS data into Excel to create graphs, pie charts, and other visual aids for more in-depth client presentations.

"Other financial advisors are always impressed by the fact that we have over \$400 million under management, and only eight full-time employees. Without CDS, managing that level of business could take 15 people or more."

Mark J. Smith,
Founder & President
M.J. Smith & Associates





From a marketing perspective, Eilers finds the ability to create sets, dynamic reports, and filters particularly valuable. For instance, if the firm chooses to terminate a mutual fund, they can use CDS to quickly identify all clients currently using the fund, determine each client's fund value, detect tax liabilities, and then create a set from which to execute the mailing. From the creation of the cover letter, to imprinting mailing labels, to tracking responses, everything can be managed from within the CDS application.

CDS also provides the data security required by independent advisory firms. As an independent firm, it's important to keep certain client details separate from the carrier's Home Office. By providing a secure way to manage all client data, CDS helps M.J. Smith & Associates maintain its independence and protect its growing book of business.

Smith says that these benefits are all important, but that the greatest value CDS provides is efficiency. "Other financial advisors are always impressed by the fact that we have over \$400 million under management, and only eight full-time employees. Without CDS, managing that level of business could take 15 people or more. As a result, we're able to provide first-rate customer service with minimal staff and less cost."

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About M.J. Smith & Associates

M.J. Smith & Associates provides financial assistance in the areas of asset management and financial planning. A Registered Investment Advisor with the SEC, the firm was established in 1983 and is based out of Englewood, Colorado.

About E-Z Data, Inc.

E-Z Data, Inc., established in 1986 is the leading provider of front-office systems for insurance companies, broker-dealers, banks, credit unions, general agents, agents and investment advisors. Its web-based SmartOffice® solutions and Windows®-based Client Data System® solution help drive efficiencies in the areas of sales, marketing, and customer service.

For more information about E-Z Data's solutions, visit www.smartofficeonline.com or call 800-777-9188.

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- > Daily downloads directly into your CDS database
- > 20% discount on all workstation licenses

Raymond James is committed to providing its independent producers with the tools they need to drive the highest possible commissions. Since 1995, the company has offered downloads directly into Client Data System.

Using a direct link, you can access daily downloads from Raymond James, and easily get all of this vital information into the right place within your own CDS database.

And through an agreement between E-Z Data and Raymond James, producers receive 20% off all workstation licenses.

Call E-Z Data today at 800-777-9188.