

# Sell Them What You Want. Give Them What They Need. And Never Make A Sales Call.

**CROWN CAPITAL SECURITIES, L.P.**

**Welcome Center**

September 7, 2000  
Broker Representative

**NetPlanner**

- Asset Allocation
- Quick Assessment
- Net Worth Analysis
- Value Based Goals
- Reduce your Debt
- Plan for Retirement
- Plan for College
- Manage your Budget
- Your Action Plan
- Financial Calculators
- Financial Library

**Stock Quotes**

Company Name:

Ticker Symbol:

**Market Watch**

	Last	Chg
DOW	11,006.72	+9.25
NASDAQ	3,894.06	-19.80
S&P 500	1,478.62	-2.25

**Most Active**

	Symbol	Last	Chg
Most Active	INTC	58.75	-0.88
Big Gainer	BAVN	19.00	+3.88
Big Loser	RBOV	7.25	-4.13

**Portfolio Watch**

[Open Your Portfolio](#)

Symbol	Last	Chg	Edit
LOOK	14.81	-0.13	
COX	33.75	-0.13	
MSFT	64.69	-1.13	
IBM	126.31	-0.66	
USW	85.75	0.00	
I	32.38	+0.63	
LU	37.94	-0.06	
AAPL	57.81	+0.97	

**Money News**

- Media Alert - CAE Inc.
- CSFB/Tremont Hedge Fund Index is Up 3.4% in August; Long/Short Equity Index is Top Performer - Up 4.9% for the Month
- Savtek to Use Avnet for Global Distribution
- Fly Networks Announces New Symbol Effective Today
- Greensboro, N.C.-Based Textile Company Tries to Allay Financial Concerns

More News: [Market](#) | [Business](#) | [Company](#)

**Services Offered**  
Credentials  
Business T

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## Lucid Financial Services

PARTNERS FOR LIVING, PARTNERS FOR LIFE

# NetPlanner®

**H**ow would you rather spend your days? Endlessly repeating the cycle of client attraction, relationship cultivation, product promotion, and sale closing? Or doing the job you were meant to do—namely, financial planning and investment strategizing? Now you do have a choice—thanks to **Lucid Financial Services' NETPLANNER**.

**NetPlanner** is a comprehensive personal financial planning system designed to provide your clients with the answers they need right now—while continually presenting them with your product offerings, the capability to act to obtain them, and a steady reminder of your role in their ongoing success. Comprised of a series of interactive modules, each addressing a specific aspect of the financial planning process, the **NetPlanner** system lends itself perfectly to the presentation of your offerings in conjunction with the appropriate **NetPlanner** module.

**NetPlanner's** true strength, however, lies in its ability to provide you with regularly-updated client information. Designed to be referred to again and again by end-users, **NetPlanner** collates user input data, makes appropriate calculations, and at the user's discretion forwards the updated information to you to ensure that you, as their planner, have the most up-to-date figures concerning their account. Thus, you can track and analyze changes in your clients' financial status, assess needs, recommend changes, and present appropriate product offerings without the need for lengthy phone calls or face-to-face client interaction.

## **The Key to the "Automatic" Sale**

By providing **NetPlanner** to your clients, you raise their awareness of their own pressing financial issues, and give them the tools they need to make more informed decisions. As a financial solution provider, your clients turn to you to provide the products they need to make the most of their resources and maximize their potential. That's where **NetPlanner** can extend your sales "reach" exponentially. A motivated **NetPlanner** user has at his or her fingertips everything necessary to assess their own needs; you have the financial products and services to meet those needs.

## **Your Clients. Your Portal.**

Adding the **NetPlanner** system to your range of client services is about the quickest, most cost-effective way to boost sales, gain referrals, and raise your visibility among both your existing and prospective clients. When your client visits your **NetPlanner** site, they'll be visiting your customized financial information portal—an impressive array of up-to-the-minute market information, stock quotes, a personalized ticker, financial news and information, as well as the web's most comprehensive financial planning system—all presented in your name, with your photograph, company logo, and contact information prominently displayed. It's a resource that makes the perfect "start" page for people who are serious about their financial futures, and its user-friendliness and ease of navigation ensures that the information your clients want and need is always readily at hand. Whether as the cornerstone of your web presence or as an adjunct to your existing services, **NetPlanner** effectively adds thousands of dollars' worth of value to your online efforts.

1  
**Customized financial portal for broker/dealers**

2  
**Instant access to extensive user-provided data**

3  
**"Automatic" sales tool – no direct client interaction required until execution**

4  
**Multiple channels for precisely-targeted marketing**



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5  
Low cost

6  
Strong client attraction/  
retention tool

8  
Powerful referral  
mechanism

7  
Sophisticated  
financial news and  
market information

9  
Comprehensive  
financial planning  
system

## ***Million-Dollar Content. For Pennies.***

And if there's a feature about NetPlanner you're really going to like, it's the price. We'll create your individualized NetPlanner portal, providing you with one of the industry's most powerful sales and branding tools, for a first-year fee of \$250 plus \$10 per additional users (minimum: 10 users, first year). Thereafter, it's only \$150 per year plus \$10 per user—from one to thousands.

## ***Learn More...***

Let us show you firsthand how a customized NetPlanner portal can boost your sales, build your brand, and grow your client base. Give us a call at (810) 263-1900, or visit us at [www.lucidfinancial.com](http://www.lucidfinancial.com) for a personal demonstration.



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[www.lucidfinancial.com](http://www.lucidfinancial.com)

*A Registered Investment Advisory Firm*