

PORTFOLIOCENTER® IMPLEMENTATION BUNDLES

PortfolioCenter is a powerful tool and most users only scratch the surface of the benefits it delivers. The Implementation Services Bundles combine product training with personalized guidance from an Implementation Coordinator, so you can maximize your return on investment by getting the full value of the software's capabilities in the shortest possible amount of time. Benefits include:

- Exposure to the full-scope of the PortfolioCenter functionality
- Best practices for using features in the most effective manner
- A dedicated contact who will guide you through the transition to the new system
- Significant savings off the list price of the bundle components purchased separately

STANDARD IMPLEMENTATION BUNDLE

The Standard Implementation Bundle provides services from an Implementation Coordinator who will conduct a series of convenient and customized Remote Training sessions for your firm.

Standard Bundle Includes:

Eight remote one-hour custom trainings utilizing your firm's active data conducted by your dedicated Implementation Coordinator .	= \$1,600
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Standard List Price	= \$1,600
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Bundle Price	= \$1,000
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CUSTOM IMPLEMENTATION BUNDLE

The Custom Implementation Bundle provides all the same services from the Standard Implementation Bundle, plus a full day of Onsite Consulting, allowing you to tailor your experience to your firm's unique needs. This bundle is ideal for firms focused on delving deeply into PortfolioCenter's capabilities to realize the greatest efficiencies and fullest value from the system.

Custom Bundle Includes:

• Eight remote one-hour custom trainings utilizing your firm's active data conducted by your dedicated Implementation Coordinator .	= \$1,600
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• 1 day of Onsite Consulting (travel not included)	= \$1,800
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Standard List Price	= \$3,400 (+ travel)
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Bundle Price	= \$2,000 (+ travel)
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Other Applicable Terms and Conditions

All implementation calls must be completed within four months of the first call and Onsite Consulting Services must be used within one year (365 days) of purchase.

Only one Implementation Service Bundle purchase per client. Customers may opt to purchase additional individual bundle components at standard list prices. Prices subject to change without notice.

For institutional audiences only.

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