INTRODUCING

praxis

PRACTICE MANAGEMENT SUITE

AUSDAL FINANCIAL PARTNERS

Praxis is Ausdal Financial Partners new integrated suite of “best of breed” practice management tools. With Praxis, you can take advantage of discounted pricing on a comprehensive array of applications and services selected to help you build your business, streamline operations and free you to spend more time with your clients. Consider the benefits…

FLEXIBLE

We realize that no two people (or practices) are alike. All Praxis components are subscription based services that allow you to select only the applications you need, when you need them.

WEB BASED

Praxis’ web based platform means that you don't have to worry about software, downloads and system requirements. All of your information is right at your fingertips anytime, anywhere

INTEGRATED

Albridge data can be integrated into most applications. This means that updated client account information can be seamlessly shared with other applications for maximum efficiency

THE PRAXIS APPLICATIONS

Within Praxis you will find a collection of “best of breed” practice management applications selected to help you develop and manage your practice more effectively. Select only the tools that fit your needs. Applications include:

FINANCIAL PLANNING

NAVIPLAN STANDARD

packages a full range of planning features into 3 easy-to-use levels that allow advisors to quickly explore “what if” scenarios and build detailed plans.

NAVIPLAN EXTENDED

is a sophisticated tool with two levels of intermediate and advanced cash-flow based planning options. Naviplan Extend is ideal for advisors who deal with the high and ultra-high net worth markets.

PROFILES PROFESSIONAL

concentrates on 13 personal and 4 business planning modules that allow you to tailor analysis based on your clients needs.

MONEYGUIDE PRO

is a comprehensive easy-to-use, goal-based financial planning system that delivers understandable, visually appealing analysis. Ideal for mainstream planning needs.

CLIENT WEALTH REPORTING AND DATA

ABRIDGE WEALTH REPORTING

Albridge consolidates client account data from hundreds of disparate sources into one cohesive set of reports and statements. Albridge’s web based application allows you and your clients access to critical data and performance reporting anytime, anywhere.

ALBRIDGE WEB SERVICES

integrates your client account data with other Praxis applications. Daily updates can be seamlessly delivered into planning, analysis and contact management programs to efficiently optimize your practice.

RESEARCH AND ANALYTICS

MORNINSTAR ADVISOR WORKSTATION

provides advisors with investment planning, client presentation, portfolio analysis, and investment research tools. Advisors can efficiently analyze investments and portfolios to give recommendations using reports and information that clients can understand.

FOREFIELD ADVISOR

is a sales, education and client communication tool that that helps the advisor deliver current, concise advice to clients. 3,ooo resources help produce FINRA reviewed case studies, concept pieces and personalized sales presentations.

MORE...

praxis
PRACTICE MANAGEMENT SUITE

PRACTICE MANAGEMENT

LASER APP

Laser App combines state of the art form filling technology with a current library of industry related forms.
Access forms from top product carriers, clearing firms and Ausdal from one central location. LaserApp seamlessly integrates with your client database and other applications to automatically populate the forms you use the most. Current forms are consistently maintained and updated so you can focus on your clients, not paperwork.

REDTAIL CRM

An easy-to-use client management solution designed specifically for financial professionals interested in client management and sales and marketing automation. The scalable high-performance platform also integrates with Albridge client data.

REDTAIL IMAGING

Provides financial professionals with a powerful option for managingand archiving documents from any location on any computer. Redtail Imaging combines industry-leading security with powerful document management in an on-demand solution.

BUSINESS DEVELOPMENT

EMERALD PUBLICATIONS

A broad range of marketing services designed specifically for the financial professional. Customize messages to fit your business. Comprehensive services include everything you need to create and deliver newsletters, seminars, websites and direct and electronic mail.

HORSESMOUTH.COM

The horsesmouth.network provides access to innovative resources and key people that can help you and your firm succeed. Every day, horsesmouth brings you new ideas for business development, practice management, financial planning, client management and investing.

MARKETING LIBRARY

MarketingLibrary.net

Imagine having the perfect thing to say in every situation.
Enjoy access to hundreds of professionally authorized marketing and advertising messages. With everything from high-impact prospecting messages to ghost-written financial articles and even birthday messages and invitations.

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