

A part of our powerful Collaborative Network application, Advisor and Client provides an immediate platform for extending your client counseling onto the web. Advisor and Client is excellent for many types of counseling such as

*Financial coaching and advising
Tax specialists and preparation*

*Educational and Career Advisors
Debt counselors*

Equipped with a powerful suite of communication tools and document management features, Advisor and Client delivers benefits that bring clients closer to you, helps your clients stay on course and respond more effectively to your counseling.

Advisor and Client is a hosted web application that requires only a web browser and internet access to use. Your clients can use the easy point-and-click interface without any training and you can be using Advisor and Client with your clients in as little as fifteen minutes from now. Our approach with Advisor and Client is designed to meet your objectives. The bottom line is that your results are guaranteed.

ADVISOR AND CLIENT ADVANTAGES

Only The Best

Most clients and counseling prospects believe only the best Advisors have client extranets. We know you are one of the best Advisors already and our software will help enforce that legacy. In person, video and telephone is how your value is normally delivered. With our software you can enhance that value by being connected to your clients around the clock.

All In One Place

Assessments, goal setting and tasks with to-do dates, correspondence and much more of your client's materials are all in one place available to your client around the clock. The online calendar makes it easy to automatically remind clients of an important date or milestone and with our Client Documents folder, anything you put in the folder is automatically in all your clients' folders.

Always Be Counseling

Increase client contact frequency and deliver more advice for the client's dollar by putting yourself and your clients material online in one of our Advisor and Client internet offices. Advisor and Client will never substitute for your in-person advice, but it is always on, always available around the clock, providing clients with your direction when you are not available.

Extend Your Reach

When travel distance prohibits regular face to face meetings then telephone and email becomes your counseling delivery platform. With Advisor and Client you can hold discussions, have instant message exchanges, put your entire counseling documentation in the files area, set client goals and the tasks to achieve those goals, and put your video and audio online.

Manage More Clients

Advice to last a lifetime even if your not engaged. With our unlimited clients pricing your counseling can continue long after the engagement ends. After the phone calls and personal visits stop, our software can be there for your client to visit with, refresh themselves with your advice, and perhaps prompt them to give you another call.

Client Satisfaction

Your clients who experience a greater sense of personal attention and satisfaction from you always have more focus towards their goals and towards applying your advice than clients who feel distant from you. Advisor and Client software guarantees more personal attention and convenience for your clients through it's always on, always counseling, internet access.

PRODUCT FEATURES

Goals and Tasks

Create client goals and supporting tasks with goal dates for each. When your client marks their goals or tasks as completed you are automatically notified of their success on your home page.

Communication

With the optional (you can turn it on or off) built in Discussions and Instant Message you can expand on your client reach. The Discussions and Instant Message are one-to-one, client and Advisor, with a securely encrypted archive of prior discussions and messages.

Custom Branding

Upload your logo to the page header which replaces our logo to create a custom branded site for your clients. We will even help you with this if you need a simple text logo. Additionally to the logo, you can put in your title, name and subtitle that also appear in the header for your clients.

Notifications

From your home page the Notifications module will keep you notified when anything changes in any client group. No more wondering what is going on in all those groups you created. Now you know when goals are met, or a client makes a change.

File Folders

A complete file and folder management system including drag and drop rearranging. Upload multiple documents simultaneously and manage document versions with our versioning system. No limit on storage space or bandwidth for files of all types.

Automated Add Client Process

Enter a clients name and email address, click "enter" and we take care of the rest in just seconds. We send email with their username and password, create their workspace, populate the files you want, and create their record in your client directory.

Essential Tools

Calendars, client and office directories, client billing system, and an Administrator menu to manage your subscription. Use client calendar to send email reminder notices of events and the client billing system emails and archives the PDF created invoices.

Security

Adjustable security settings for clients and staff with file and folder access fully configurable. We encrypt your data during transmission and in our database. This web application is compliant with HIPAA standards and all state and federal security guidelines.

Advisor and Client is not designed for an abstract method of personal relationship with your client. You will always be the Advisor, software will never be a good Advisor. Rather Advisor and Client is an adjunct to your counseling, a tool to assist your client, a way for you to extend your reach, to always have a shared workspace between you and your clients. Having an Advisor is an individual and personal experience and Advisor and Client can be there for your client after the personal setting ends and provides your client with ongoing help and communication tools.

OUR PROMISE

Whatever client communication problems you are facing,

we will help you solve them.

Whatever your client retention goals are,

we will help you reach them.

Whatever your dreams are for a bigger business in the future,

we will help you build them.

PRICING

\$29.95 per month, per Advisor, billed to a credit card on a recurring monthly subscription. For more subscription details please read the pricing page at clctechnology.com.

One subscription provides

- Unlimited clients, guests and users
- Unlimited office staff
- Unlimited data storage and transfer
- Unlimited telephone support
- Rebranding with your logo
- Free software upgrades
- Free first month of service
- Monthly payment statements emailed

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