

➤ [visit the smarshCRM website](#)

smarshCRM creates efficiency for advisors with the ability to customize the entire application. With an intuitive, user-friendly interface, smarshCRM integrates customer data from several locations – email, a global address book, calendars, real-time tasks and events, customized campaigns, contact data – into a single application that manages daily workflow.

By default, smarshCRM will set up a Rep office on the VSR “region” of smarshCRM, allowing VSR Rep Solutions to help you with technical assistance.

Deliverable	VSR Preferred Pricing
One-Time Setup	\$250
One-Time Import (Optional)	\$250
Monthly Access	\$50/month (up to 5 accounts)
Customer & Technical Support	Included

*Additional incentives can be provided to offices that subscribe to both Financial Visions and smarshCRM

Smarsh will make the following services available:

- Calendar
- “My Day” Assistant
- Task/Event List
- Campaign Management
- Reporting Capabilities
- Financial Calculators
- Dynamic groups
- Create user accounts
- Populated sample campaign templates
- 24x7 Server Diagnostics Monitoring
- 24x7 Domain Availability Monitoring
- Account Manager
- Customer Support

Call Smarsh at 800-593-9228.

Please direct all questions about smarshCRM or Financial Visions to VSR Rep Solutions at 866-793-8335. Ask for Kevin Johannesen or Austin Vashaw.