



BUDDHA RISK ANALYZER

Special Order Form

Name _____

Address _____

City _____ State _____ Zip _____

Phone _____ Email _____

We are very excited to be rolling out the industry's only "real world" investment risk tolerance program. This program is uniquely designed to help insurance agents, RIAs, IARs as well as conservative minded Series 7 licensed advisors.

Our risk tolerance program will help advisors:

- 1) Mitigate compliance/regulatory issues (it will help with suitability standards).
- 2) Increase your marketing. This program will help you grow your email database.
- 3) Increase your FIAs and IUL sales. You will know without question if users of this program are candidates for fixed product sales.
- 4) Increase your AUM. If you are securities licensed, this program will help facilitate a discussion about "proper" wealth building in the stock market.

The normal retail price to gain access to the software is \$50 a month.

For our initial roll out, we will be letting the first 100 advisors who sign up to use the software gain access to it for only \$25 a month for the first twelve months.

At such a low price point, it shouldn't be a difficult decision to move forward with this special offer so advisors can use this unique program on a website, Facebook, Twitter, an email signature, etc.

If you have any questions, email info@buddhacrm.com or call Rocco at 269-216-9978

Credit Card Payment Options

Visa or MC Number _____ Exp. Date: _____ 3 digit ID _____

The address listed above must be the billing address for the credit card.

____ Yes I understand that in order to take advantage of the 50% discount I am committing to a 12-month subscription and can cancel any time after the initial 12-month period.

Return completed education registration form and payment to: TriArc Advisors, LLC: info@thewpi.org or 144 Grand Blvd., Benton Harbor, MI 49022. Fax: **313-887-0532**. Phone: 269-216-9978.