

# MAXIMIZER FOR FINANCIAL ADVISORS

## *Advanced Training Agenda*

### **HOW DO I SEGMENT MY DATABASE?**

Use Advanced Search to generate dynamic lists  
Post your best advanced searches to Quick Access  
Attach column setups to all your searches and lists

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### **HOW DO I CREATE AND USE EMAIL TEMPLATES?**

Set up an email template  
Set up the CASL Protection to go with it  
Follow best practices for email templates

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### **HOW DOES THE WORD INTEGRATION WORK?**

Create Word templates to save time and effort  
Convert important documents into templates  
Use Word for mailing labels and envelopes too

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### **HOW DO I REPORT ON WHAT I'VE BEEN DOING?**

Export to Excel for quick and easy reporting  
Use Dashboards for strong visual messages  
Use other built-in reports as needed

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### **HOW DO I USE THE ADVANCED TOOLS IN MAXIMIZER?**

Set up Auditing for compliance and tracking database changes  
Use the Import Tool to easily add entries  
Use Global Edit to easily change multiple entries

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### **WHAT ELSE CAN I DO IN MAXIMIZER?**

Set up "Date Last Contacted" to track Client contact  
Convert one entry type to another  
Breakup and merge/combine Households