Junxure Newsletter

Junxure News, Training & Tips - February 2010

In This Issue:

Junxure Office Reminder Actions for the Month

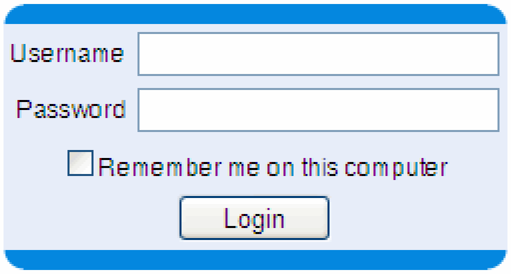
- ☑ Review Email and Document Templates for Upcoming Tax Season Mailings
- ☑ Add Recurring Actions for Cost Basis Report Prep
- ☑ Review and Enter CPA Contact Information for your Clients

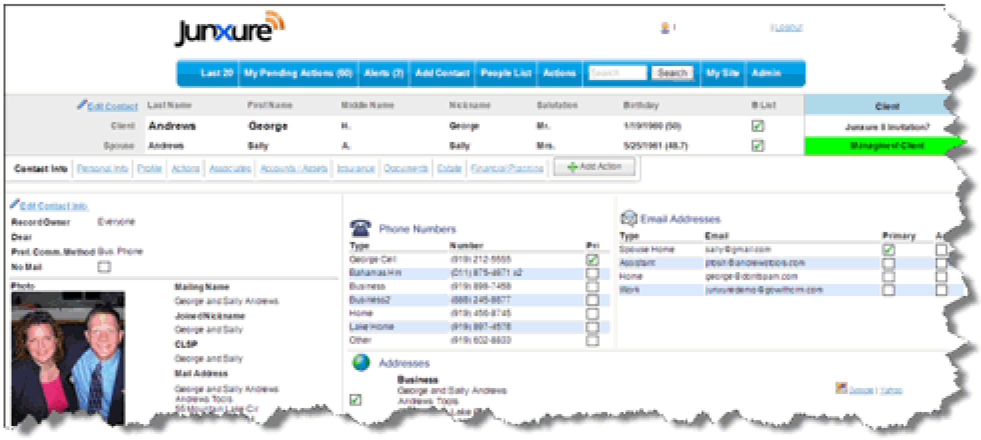
What's New at Junxure

2010: The Year of Mobile

With the proliferation of more sophisticated mobile devices, faster and more reliable networks, longer laptop battery life, and anywhere internet access, this year and beyond is definitely going mobile. Junxure Mobile, the new add-in to Junxure 8, gives you the best of both worlds; the power and robust features that only your desktop version can provide AND a mobile connection with your Junxure database back in your office. The familiar interface in Junxure Mobile allows you to handle most of the tasks you would normally complete back at your office such as searching for contacts, adding and assigning actions, adding a new contact, or entering notes. If you would like more information about Junxure Mobile, please call us at 866-JUNXURE (586-9873), option 2 or email us a sales@junxure.com

Welcome to Junxure Web! Please Login.





Message from Greg Friedman, MS, CFP® - President, Junxure

As you know I am always sharing ideas and resources that help me in my wealth management business in order to help you. Many of you have heard of Bob Veres and his services (described below) which I highly recommend.

Inside Information is an all-around resource for financial planners of all shapes and sizes. The monthly publication gives you a lot of advice and information about what other leading practices are doing, and provides great tips for serving clients better, bringing in clients, and managing your practice. The Media Reviews service summarizes all the articles in the trade journals that are sitting in a pile next to your desk and saves me a TON of time - so you get all the important information in minutes instead of hours a month.

And now there's a new service, where Bob writes two or three short articles every month that you can send to clients. Plus (and this is the part that can save you time) every quarter, he writes a quarterly review of the markets that you change, edit and use when you send out your performance statements. The Client Articles cost extra, but if you buy the Inside Information service, they cost $298--which means if it saves you an hour a year of time, it has paid for itself.

The cost of Inside Information is normally $349 for the year, but we´ve negotiated a deal where you can buy it for $295 with an exclusive Junxure coupon code. Also, if you want the Client Services articles you'll get the $449 Client Articles service for $298.

Click here for a recent issue of Inside Information that you can look at, as well as here for a couple of the recent Client Articles .

If you are a current Junxure customer and would like to take advantage of this offer, please email us at admin@junxure.com for instructions. I am sure you will find Bob's material incredibly valuable!

Greg

P.S. Junxure does NOT receive any compensation for this - it is just my way of trying to help you, our customers!

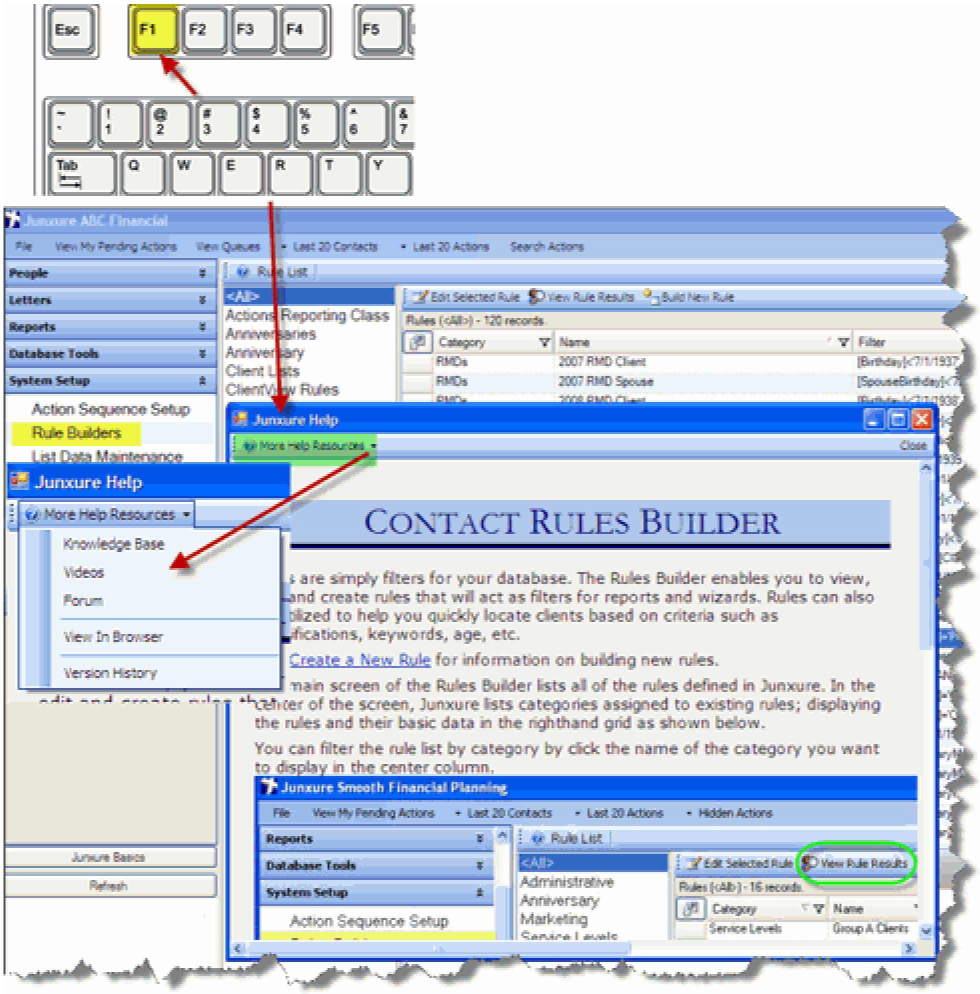
Tip of the Month - Junxure Support

F1 Help – Junxure Help at the Tip of Your Fingers

Did you know that that there is a new built-in help feature available directly within Junxure 8? With the push of just one button help is on the way for your current task.

Let's say you are in the Contact Rules Builder feature as you are in the process of building a new rule (database query), however, you discover that you can't recall all of the details of how to build a rule. By selecting the F1 key on your keyboard (as shown below), you will be brought directly to the appropriate Online Support Topic for the Contact Rules Builder.

In the Online Support, you will have easy access to additional help resources, just by selecting the More Help Resources down arrow (as highlighted in green below). These help resources include videos, knowledge base articles and the forum.



User to User Forum Highlights

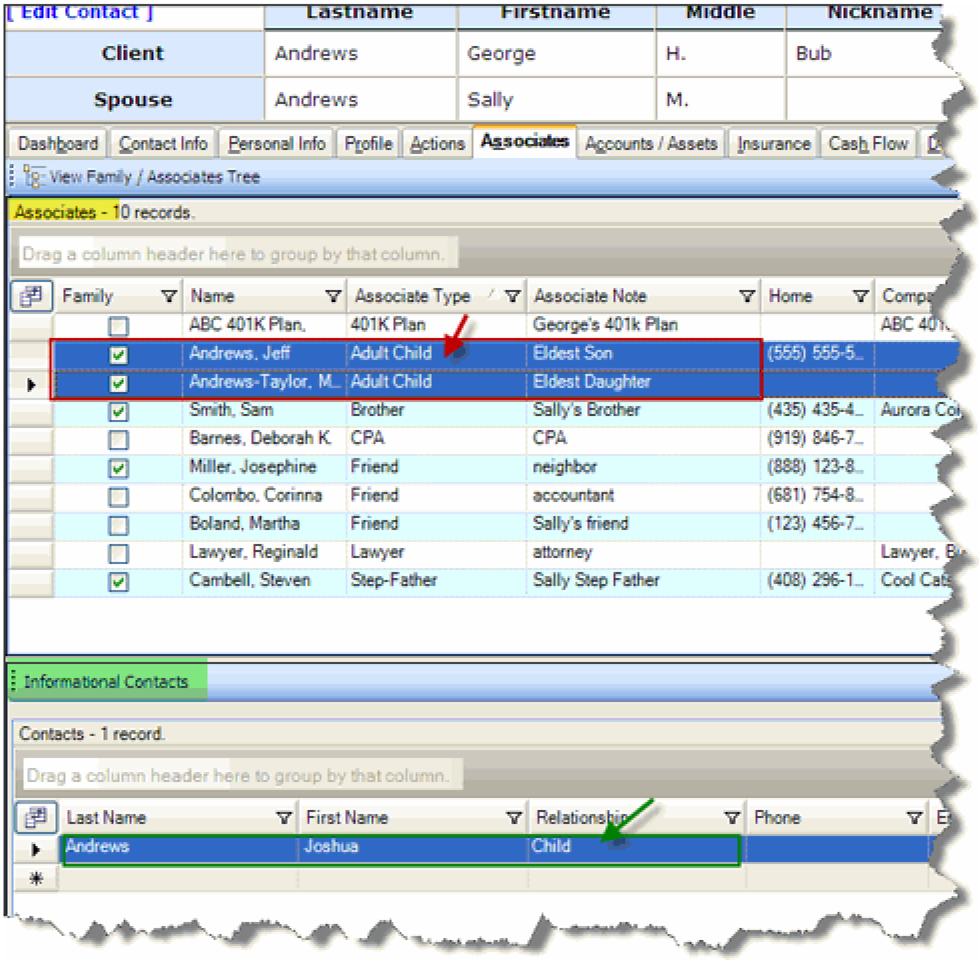
Many of our Junxure offices utilize the User to User Forum to gain insight into how other offices use the program. To register for the User to User Forum click here. Here is a helpful posting regarding where to enter contact information for the children of your clients and what information is reportable.

Junxure Office 1: Where do I enter information for the children of our clients?

Forum Answer: Children of clients can be entered in Junxure in a couple of different ways:

1) You can use the Associates Tab (highlighted in yellow below) to tie family members, such as parents with their children. Create the children as contacts in the database, and then make them an associate to their parent's record. This is the recommended method if you will need to keep a separate contact record for the children in order to document conversations, correspond, record notes, or search the database for the children by name, which can often be the case for adult children.

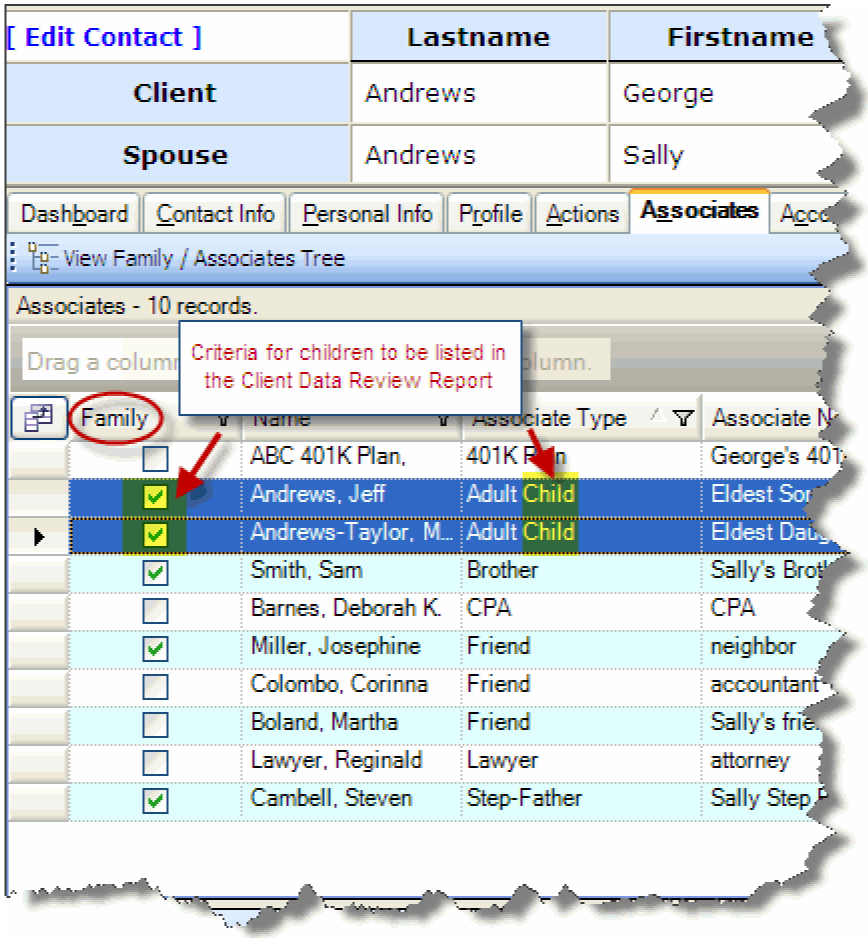
2) If you do not need to create a separate record for the children of your clients, then you can use also use the Associates Tab, however, instead, list the children’s information under their parent’s Informational Contact section (highlighted in green below). The children will not have a record in Junxure, and only basic data can be stored regarding them, meaning you will not be able to correspond, record notes, or search the database for the children by name.



Junxure Office 2: *I ran a report from the Client Reports - Client Data Review, but the field for children is blank. I know the client has children, so we must not have done something right when entering info. Where does this pull from? How do I get this to show on the report? We are putting our children in the Associates Tab under the Informational Contacts sections.*

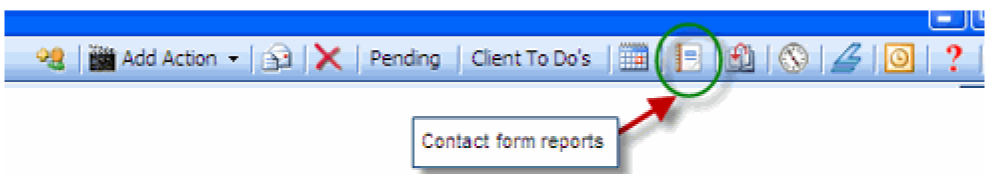
Forum Answer: The Client Data Review report was designed to include only children that have a full record in Junxure. If you would like the children of clients to appear in this particular report, you would have to add the children as contacts in the database first, then make them an associate to their parent's record.

The criteria for children to show up on the Client Data Review report is that a child associate must have the "Family" box checked and the "Associate Type" must contain the word "child" (not case sensitive) as shown below.

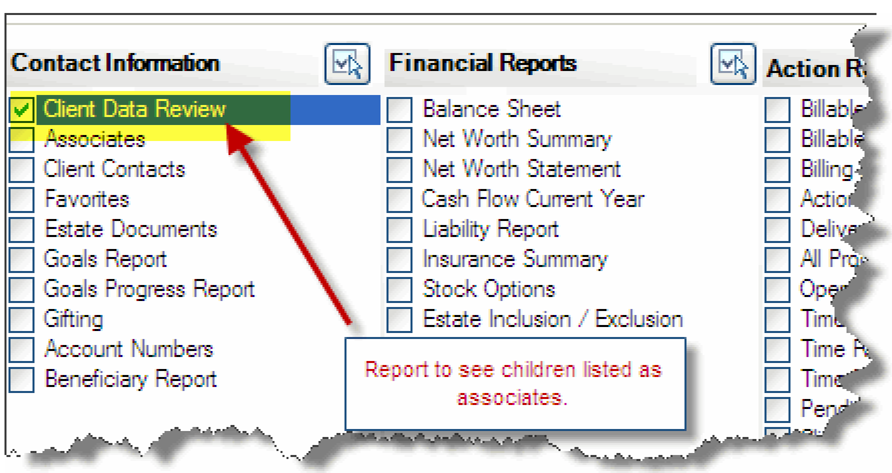


To run the Client Data Review Report:

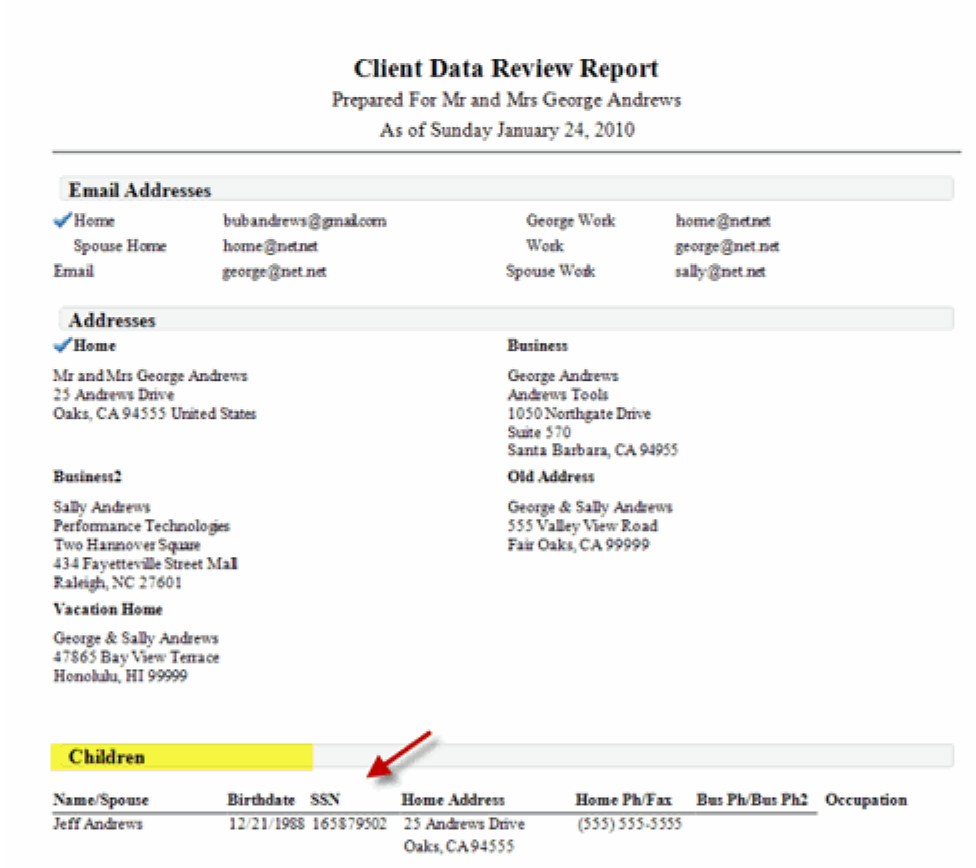
Step 1: In the contact tab toolbar select the Reports button as show circled in green below.



Step 2: The Client Reports screen is displayed. Choose the Client Data Review report by clicking the boxes highlighted in yellow below.



In the report, you will notice that all of the child associates will be listed under the header of Children as shown highlighted in yellow below.



Client Data Review Report
Prepared For Mr and Mrs George Andrews
As of Sunday January 24, 2010

Email Addresses

Home	bubandrews@gmail.com	George Work	home@net.net
Spouse Home	home@net.net	Work	george@net.net
Email	george@net.net	Spouse Work	sally@net.net

Addresses

Home
Mr and Mrs George Andrews
25 Andrews Drive
Oaks, CA 94555 United States

Business
George Andrews
Andrews Tools
1050 Northgate Drive
Suite 570
Santa Barbara, CA 94955

Business2
Sally Andrews
Performance Technologies
Two Hannover Square
434 Fayetteville Street Mall
Raleigh, NC 27601

Old Address
George & Sally Andrews
555 Valley View Road
Fair Oaks, CA 99999

Vacation Home
George & Sally Andrews
47865 Bay View Terrace
Honolulu, HI 99999

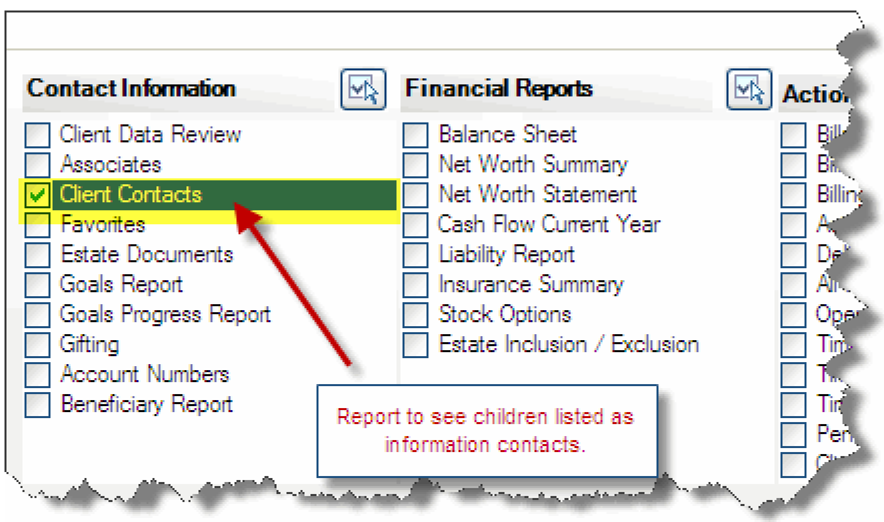
Children

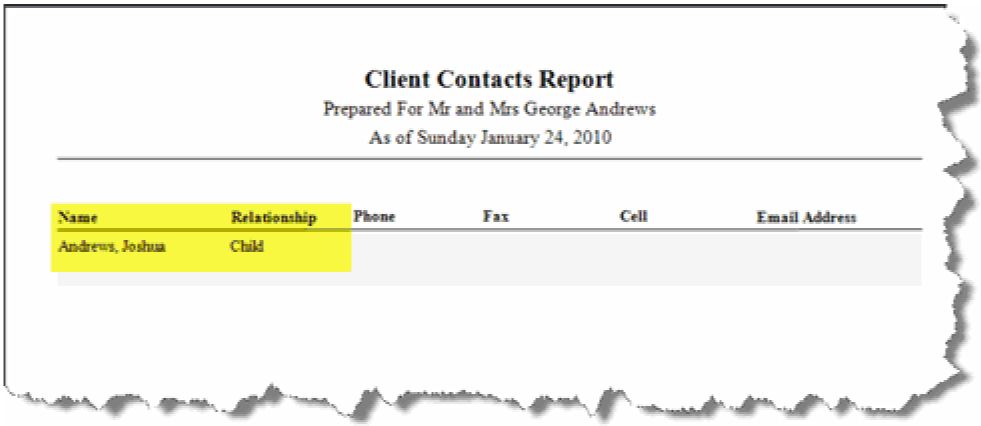
Name/Spouse	Birthdate	SSN	Home Address	Home Ph/Fax	Bus Ph/Bus Ph2	Occupation
Jeff Andrews	12/21/1988	165879502	25 Andrews Drive Oaks, CA 94555	(555) 555-5555		

If you select the Associates report in the client reports screen, children associates will be listed as shown highlighted in yellow below.

Informational Contact Reports

If you have children listed under their parent's Informational Contact area in the associates tab, you can still report on that information simply by selecting the Client Contacts report instead of the Client Data Review report as show highlighted in yellow below.





Client Contacts Report

Prepared For Mr and Mrs George Andrews

As of Sunday January 24, 2010

Name	Relationship	Phone	Fax	Cell	Email Address
Andrews, Joshua	Child				

Junxure Solutions Group Expert Advice

An Action Sequence Whose Time Has Come: Roth IRA Conversions

Actions Sequences are one of the many features in Junxure designed to help your office streamline workflow and enhance productivity. Theses sequences allow you to convert various procedures in your office into a set of actions in Junxure that are dependent or related to one another. These sequences are often things that you do in the office on a regular basis. Examples might be new account setup or a change of beneficiary.

2010 brought a new opportunity (some might say challenge) for advisors in the form of changes to the eligibility rules for Roth IRA Conversions. As with many tax law changes, this one is far from simple, with many things to consider and steps to follow as you guide your clients in making the right decision. That sounds like a great example of an action sequence to us here at Junxure. We thought this topic would be a helpful way to demonstrate the benefits of using an action sequence.

Since we are not financial advisors we went straight to the source for input, our Junxure clients. A big thank you to the firms who posted ideas to the forum, sent us ideas and talked with us about this topic. Their willingness to share with us and their colleagues allowed us to create this sample action sequence. We hope that this example sparks some ideas on how you can create your own, office specific Roth IRA Conversion Action Sequence.

Sample Roth IRA Conversion Action Sequence

Step One: Review with Client the Following Questions:

- Tax Impact of conversion
- Need for funds to pay additional tax
- Need for funds in retirement
- Beneficiary issues
- If client still wishes to proceed, add next action step

Step Two: Conversation with Tax Professional

- Address all tax consequences of conversion with Tax Professional
  - Examples: tax bracket, AMT issues, when to pay taxes, estimated quarterly payments, potential effects on deductions/credits, etc
- Have conversation with client about advice of tax professional
- If client still wishes to proceed, add next action step

Step Three: Open Roth Conversion Account

- Create necessary paperwork for Roth Conversion account
  - Examples: New account forms, Account transfer/conversion forms, Contract/IPS
- Send to client for signature

Step Four: Paperwork to Custodian

- Send paperwork to custodian to process conversion
- Follow process until conversion is complete

Step Five: Communicate to Client the Conversion Has Been Completed

Step Six: Communicate to Tax Professional

- Let Tax Professional know when conversion was completed and the amount

Step Seven: Update Accounts Asset Tab in Junxure

- Update tab with new Roth account number and any relevant info necessary to add to the tab
  - Examples: Beneficiary Information, Account Status Information, etc.

Step Eight: Funds for Estimated Tax Payments

- Assess if cash needs to be raised for tax payments and make any appropriate trades

For more information about how to build action sequences click here to view our educational video.

Junxure Training Solutions

JUNXURE Practice Management Virtual User Group
February Topic: Mining your Database – Rules & Reporting

Februay 26th at 1:00 pm (Eastern Time) is the date and time of our next Junxure Practice Management Virtual User Group session hosted by Erin Kincheloe, Director of the Junxure Solutions Consulting and Training Group. Erin is a former advisor who used Junxure in her firm, and has provided training and consulting to many of our Junxure clients. While Erin will bring her ideas and “best practice” insights to this 1 hour virtual session, it is also for sharing YOUR QUESTIONS, IDEAS AND SUGGESTIONS with others in the group.

Topics:

- Rules Builders
- Report Wizards
- Reports to help you manage your employees & your firm
- Reports for managing you data
- Reporting on Actions

Cost to attend these sessions is $75 per computer logged in (unlimited attendees). In addition to limited class size, the number of classes is also limited and attendance will be on a first-come, first-served basis. Please visit our web site at http://www.junxure.com/training or simply click here for scheduled times and to sign up.

NOTE: This is not a training class and should NOT be attended in lieu of our training classes. These User Groups are discussions on practical applications of these tools as well as offering practice management suggestions for your office.

If you have questions contact the Solutions Group via email at training@junxure.com or via phone at 1-866-586-9873, Option 5.

Upcoming Junxure Web Classes

NOTE: Beginning in March 2010, we will introduce a new format for our key person and general staff web classes

If you are new to Junxure or already proficient with the basic features, our web-based training curriculum is one of the many training options available to help you access the full potential of the Junxure system.

Online Classes Scheduled for the Month of February include:

Date(s)	Time	Class
February 19th	2 PM (ET)	Junxure 8 Essentials
February 11th	2 PM (ET)	Handling Meetings
February 2nd, 3rd, 4th, 9th, 10th	2 PM (ET)	Key Person Class Series
February 17th, 18th, 23rd, 24th, 25th	2 PM (ET)	General Staff Class Series

Make sure you register early! These popular classes fill up quickly as space is limited. For more detail about each class, to review the schedule, or register for our upcoming web classes click here.

All web-based classes will introduce Junxure 8 enhancements and additions.

Junxure

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