



OUR HISTORY

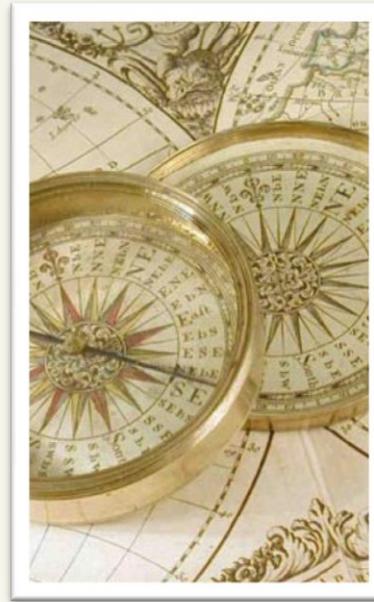
The Forum was established during 2003 by asset management firms desiring to exchange thoughts about a particular software package they all utilized. During the initial meeting it was determined that the Forum would be conducted at least semi-annually with the goals of:

- Exchanging best practices
- Trading “work-arounds” for the common package
- Discussing strategy to approach the common provider
- Enhancing one another’s knowledge of CRM

The Forum has grown in membership throughout the years with the original firms still participating and the topics discussed have expanded beyond the common package and provider to an open architect environment.

Today, On Course Advisors administers Web exchanges and semi-annual forums for Asset Management and Advisory & Wealth Management Firms.

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JULY 13, 2010

CRM FORUM

ADVISORY &
WEALTH
MANAGEMENT



Bank of America/Merrill Lynch

Bank of America Tower

One Bryant Park

New York, NY 10036

Conference Room #2 Madison Sq. Pk.



THE CRM FORUM DIFFERENCE

Mission Statement

The Mission of the CRM Forum is to bring together business and technology professionals to exchange views and best practices relating to client relationship management and to provide the education to further the advancement of CRM.

Client Relationship Management is finally making a move into the enterprise. No longer can companies afford to keep their client information separate from their product and financial information. The whole machine needs to work in concert and be managed accordingly. It is crucial to be supported both in the office and on the road. When a deal is closed it is imperative to capture all relevant information while updating the status of the relationship. The technical capabilities of this space are ever evolving.

On Course Advisors has a vision of a connected workplace: Employees to information, your business to your customers and connecting the systems that make your enterprise run. An effective CRM deployment frees employees from time consuming processes and empowers them with the functionality they need to focus on selling efficiently, delivering quality customer service and being in the business of building profitable long term customer relationships.

TUESDAY, JULY 13

AGENDA:

8:30 - 9:00 Networking Coffee

9:00 -9:15 Opening Remarks and
Introductions

9:15 -11:30 Roundtable Member
Exchange

11:30 - 1:00 Luncheon & Discussion

1:00 - 3:00 Roundtable Member
Exchange

3:00 - 3:15 Wrap-up & Agenda for
Next Meeting

3:15 - 3:30 Business Card Exchange