



Licensing Fees for Wealthy and Wise® (Advanced)

- ✓ Any current licensee of Wealthy and Wise® (including Power Producers) can upgrade to the Advanced version for an initial fee of \$600 with monthly maintenance increasing by \$40.00 a month.
- ✓ For those not currently licensed for Wealthy and Wise®, the fees for Wealthy and Wise® (Advanced) are \$2,250 with monthly maintenance of \$99.95 a month.
- ✓ The fees for individual attorneys and CPAs for Wealthy and Wise® (Advanced) are \$2,250 + \$99.95/month.
- ✓ Agency versions of Wealthy and Wise® (Advanced) are available when multiple users are involved.

Wealthy and Wise® (Advanced) includes all the current features of Wealthy and Wise®.

For information about the licensing categories above, contact Julie Nayeri at julien@insmark.com or 888-InsMark (467-6275). You can also purchase licenses at www.insmark.com/waw-adv.

For information about the licensing categories below, contact David Grant, Senior Vice President – Sales, at dag@insmark.com or 925-543-0513.

- ✓ IMOs and BGAs currently licensed for Wealthy and Wise® can upgrade to the Advanced version for an initial fee of \$600 and an increase monthly maintenance of \$40/mo..
- ✓ Agency versions of Wealthy and Wise® (Advanced) are available for IMOs & BGAs.
- ✓ Any life insurance company currently licensed for Home Office versions of Wealthy and Wise® can upgrade to the Advanced version for an initial fee of \$8,750 and increase maintenance of \$500/mo. Special discounts are available if multiple users are licensed.
- ✓ New life insurance companies' fees to acquire Wealthy and Wise® (Advanced) are \$17,500 and \$1,500/month. Special discounts are available if multiple users are licensed.

Note: Maintenance fees provide specific enhancements and free technical support.

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