



## Data Subscriptions

### Intra-Agent Services

www.KnowITOnline.com  
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### Client Management System

Agent Login .....\$125.00/month

Administrator Login ..... \$60.00/per month

You must subscribe to the system in order to use any of our other services such as QR newsletters and CFR statements.

### Data Collection & Mining Services

In order to produce Consolidated Financial Reviews, you must also subscribe to our data mining services. Charges are per account mined.

Data Mining - Electronic. (DST, TD Ameritrade, Pershing) ..... \$FREE

Electronic data available through Pershing, TD Ameritrade and DST Fanmail are processed free of charge.

Data Mining - Automated ..... \$ .20

Automated data mining charges apply to accounts for which we have designed proprietary programming to obtain the information. Companies we can obtain data (Fixed & EIA) from are: AIG, Allianz Life, AUL, AVIVA, ING/Reliastar Life, JFP (now Lincoln Financial) LSW, Midland Nation Life, Protective Life (old Zurich/Chase Fixed Accounts), Symetra and others.

Data Mining - Manual 1 ..... \$ .50

Data Mining - Manual 2 ..... \$ .75

Manual accounts are those where our operators need to call to obtain the information on your behalf. The level of difficulty obtaining information determines which price applies to a particular vendor.

### Companies that may update through the download process:

- ✓ AIG (Western National)
- ✓ Alliaz Life Insurance\*
- ✓ American United Life (457)\*
- ✓ Aviva / Amerus
- ✓ Aviva Annuity and Life ( Avivaedge)\*
- ✓ Great America Life
- ✓ Horace Mann
- ✓ Lincoln Financial/Jefferson Pilot
- ✓ Lincoln Financial
- ✓ LSW – Life of the Southwest
- ✓ Midland Annuity and Life
- ✓ Old Mutual Insurance
- ✓ Protective Life/Chase Insurance (Fixed)\*
- ✓ Reliastar/Northern Life ( ING)
- ✓ Symetra

#### Note:

All other companies require the client and policy data to exist correctly in the system to be able to update information.

Login information must be correctly setup on each agents UserID tab.

\*Client and policy data may be setup automatically through the downloader process