

Current Company Promotions

- Client Newsletter**  
*Choice  
BusinessScape  
Statement Linking  
AAA Year-end Statements  
Tax-free Income  
ClientServ*
- Statement Message**  
*"You have until April 15th to open or fund a 2001 IRA. Limit rises to \$3,000 for 2002."*
- Statement Stuffer**  
*NetWorth*
- Branch Call Reception**  
*IRA 2001 contributions  
401(k) rollovers*
- Investment Perspectives**  
*"More good news than bad; financials to see-saw; cash position rises from 9 to 10%"*
- morganstanleyindividual.com**  
*401(k) Rollovers*
- ClientServ**  
*401(k) Rollovers*
- National TV**  
*"Wedding" and "Reading" ads stress need to invest no matter the environment*
- National Radio**  
*Nat'l. Muni Bonds  
Night, Feb.26*
- Sponsorships & Affiliations**  
*Make A Wish Foundation  
— Discover Card*



## Prospect Central

### Get coordinated!

Welcome to Prospect Central, the quickest way to integrate the company's general and product-specific promotions with your local prospecting efforts. Statement stuffers, ad campaigns, seminars and laptop presentations, access to the Do Not Call List and Outlook mail merge tips... everything you need to make your prospecting more efficient than ever.

### Products & Services Campaigns

Select from these pre-packaged campaigns:

Choice

### Local Campaign Builder

Find pre-packaged campaigns and other resources you can incorporate into your local marketing campaign:

Asset Allocation

### Resources by Type

- [General and product seminars links](#)
- [General and product laptop presentations](#)
- [Approved e-mail marketing materials](#)
- [Direct mail campaigns](#)
- [Local ads](#)
- [Privacy Statement](#)

### New Prospecting Tools

- [Business Intelligence System \(BIS\)](#)
- [Morningstar Portfolio X-Rays](#)

### Other Prospecting Tools

- [Retirement Analyzer](#)
- [Microsoft Excel Options Analyzer](#)
- [E-leads center](#)
- [All about CLF](#)

### Call Center

Prospect scripts: New to community

Client scripts: Convert to Choice

[Do Not Call List](#)

### Advanced Prospecting Techniques

- [Tips on organizing contacts in Outlook](#)
- [Exporting your Outlook lists to CLF](#)
- [Conducting a Word Mail Merge](#)



Vol.

Vol.