

# planEASe<sup>®</sup> Company Licensing (Policy and Pricing)

planEASe is available for licensing by the investment professionals at your company under the following arrangements. Thank you for your inquiry, and we look forward to working with you in installing and supporting planEASe for your investment professionals.

## **LICENSING**

As discussed, you anticipate licensing the currently software for several of your agents. In doing so, you may mix and match from the following product prices at any one physical site:

<b>Product</b>	<b>First Copy</b>	<b>Added copies</b>
planEASe/Windows*	\$995	\$895
Reporting Extension	\$400	\$300
Graphics Extension	\$400	\$300
Financial Utilities	\$200	\$200
Partnership Models	\$400	\$400
Monthly Extension	\$500	\$500

\* Each license requires the purchase of planEASe/Windows. The other five products are add-ons to planEASe/Windows, and you may choose to add any or all to any license. Multiple prices are only for licenses at the same physical site.

Each licensed copy of planEASe will be owned by your company, but licensed (by name) to one of your agents. Annual support for each license will be \$195, which includes 800 number support and all updates issued during the year for the product(s) purchased. The licensed agent may install his/her copy on any computer owned by the company or by the agent.

## **TRANSFER OF LICENSES**

If a licensed agent terminates employment with your company, or if for other reason you want to transfer a planEASe license from one agent to another, you must recover the planEASe dongle from the agent and forward to us the name and address of the agent to which the license is to be reassigned. License transfers will be processed for \$295 per license, regardless of the original cost of the product(s) purchased. This transfer cost covers the cost of the added support calls associated with a new user.

## **PAYMENT**

All license fees are due in advance of shipment. We accept Visa/MC/AE/Disc cards or can ship COD for your Company Check. The \$195 annual support fee for each license is due prior to shipment of the next major upgrade.

Prices quoted here are currently valid, but are subject to change without notice. The \$195 annual support fee may be changed at any time, but will never be any higher than the support fee charged to our individual planEASe users.