

# SmartLink for Quik! Forms

## Automating the time-consuming task of form filling

Filling out forms is a necessary and time-consuming task that is an integral part of your business. As your business grows, the number of forms you need to manage grows as well — and every one of your vendors is constantly updating their individual forms, making the challenge more complex than ever. From the challenges of going to multiple websites to get appropriate forms, entering your client demographics, verifying information, and handling errors resulting from data redundancy and re-entry, staying on top of the basic task of form filling can be a tedious challenge.

## Simplify Form Filling and Get Back to Selling

SmartLink for Quik!™ Forms integrates trusted form-filling software from Quik! Forms with your SmartOffice solution to simplify the process of managing and filling out the forms you use every day. Easy to use, SmartLink for Quik! Forms transfers your client data and key relations with a click of a button, and automatically launches the Quik! Forms Library. Your SmartOffice contact data is automatically transferred to the most current forms from each of your vendors. Automated form filling transfers approximately 80 percent of the information needed for each form directly from your SmartOffice database to the appropriate form. And the solution automatically checks for updates to ensure you have the right form every time.

The result: an easy-to-use, integrated solution that minimizes data entry, reduces errors, and speeds processing.

### DATASHEET

- *Speed the form-filling process*
- *Eliminate redundant data entry and reduce human error*
- *Leverage a complete online library of updated forms*
- *Update forms automatically via an online update service*



# SmartLink for Quik! Forms provides these valuable benefits

- **One-click Integration**  
*With one click of a button, data is transferred and Quik! Forms is launched.*
- **Easy to Use**  
*The integration is intuitive, so no additional training is required.*
- **Saves Time**  
*Processes that used to take hours per client can be reduced to minutes.*



*Take the next step toward superior service, greater growth, & better business:*

- **SmartOffice®**  
Professional Edition  
for Insurance Agents
- **SmartOffice®**  
Premier Edition for  
Financial Advisors
- **SmartOffice®**  
Premier Edition  
for Brokerage  
General Agencies

To learn more about the SmartOffice solution designed for your business,

**call 800-777-9188 or go to [www.ezdata.com](http://www.ezdata.com).**

*The selected contact's key relations are also transferred to Quik! Forms, enabling the user to select the appropriate joint applicant, beneficiary, and/or annuitant when necessary.*

*SmartLink for Quik! Forms transfers data from your SmartOffice database to automatically fill out a wide variety of forms.*

Joseph M. Ackerman (Joe) (Spouse: Katie)

Contact	Household	Opportunities	Pending Cases	Policies	Investment Accounts	Investment Positions	>>
<a href="#">List</a>   <a href="#">Personal</a>   <a href="#">Add Personal</a>   <a href="#">Key Relations</a>   <a href="#">Benefits</a>   <a href="#">Asset Allocation</a> (X)   <a href="#">Performance</a> (J)   <a href="#">Letters/Documents</a>   >>							
<b>Key Relations</b>   Relationship Type: All   Options							
Relationship	Related To Contact Name	Type	Job Title	Remarks			
<input type="checkbox"/> Son	Ackerman, Kenneth	Dependent					
<input type="checkbox"/> Daughter	Ackerman, Marianne	Dependent					
<input type="checkbox"/> Wife	Ackerman, Kathleen	Client	Architect				
<input type="checkbox"/> Friend	Peterson, George	Client	Chief Financial Officer				
<input type="checkbox"/> Associate	Halverson, Randall	Client	Physician				
<input type="checkbox"/> Associate	Halverson, Joe	Client	Branch Manager				

Business Relations	Business Name	Role	Referred Contact
<input type="checkbox"/> Owner	Joseph M. Ackerman, M.D. Inc.		<input type="checkbox"/> Contact Name
<input type="checkbox"/> Partner	ABC Manufacturing		<input type="checkbox"/> Adams, Mary
			<input type="checkbox"/> Ansong, David
			<input type="checkbox"/> Arrieta, Michael
			<input type="checkbox"/> Bartels, Frank
			<input type="checkbox"/> Christiansen, John
			<input type="checkbox"/> Gunderson, David
			<input type="checkbox"/> Hurst, Suzy

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https://webvcs.quikforms.com/formview/FormViewTransaction.aspx?UNID=efZrsZkSiaIIQBWYgyUczHp - Wi...

https://webvcs.quikforms.com/formview/FormViewTransaction.aspx

Please fill out the following form. You cannot save data typed into this form.  
Please print your completed form if you would like a copy for your records.

**Application for Annuity**

1. Owner (if additional space is needed, use section 10 - Special Requests)

☐ Individual

First: Joseph Middle: M. Last: Ackerman

Sex: ☐ Male ☐ Female Date of birth (mm/dd/yyyy): 02/27/1950 Age: Social Security number: 559-65-8750

Phone number (Home): (626) 799-2951 Phone number (Work): (310) 309-0348

Mailing address: 488 S. Oakland Avenue

City: Pasadena State: CA Zip code: 91101

☐ Joint Owner (Owners are joint tenants with rights of survivorship)

First: Kathleen Middle: M. Last: Ackerman

Sex: ☐ Male ☐ Female Relationship to owner: Date of birth (mm/dd/yyyy): 01/03/1958 Age: Social Security number: 550-76-3111

Mailing address: 488 S. Oakland Avenue

City: Pasadena State: CA Zip code: 91101

Done Unknown Zone



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