

TCA Strategic Partnerships – Pricing Discount Summary

Discounted Pricing	
Jefferson National	<p>Integrated solution:</p> <ul style="list-style-type: none"> ▪ \$0 additional cost to advisors or investors
Redtail	<p>CRM:</p> <ul style="list-style-type: none"> ▪ \$60/month (\$720/year) includes 15 users (~8% discount) <ul style="list-style-type: none"> ○ \$120 off if sign up for full year in advance (\$600/year) (~9% discount) <p>Imaging:</p> <ul style="list-style-type: none"> ▪ \$45/month/subscriber (~8% discount) <ul style="list-style-type: none"> ○ Each subscriber can have 15 consecutive named logins; each subscriber has access to 10 GB of storage; additional storage = \$4/GB/month) <p>Email:</p> <ul style="list-style-type: none"> ▪ \$8/archived mailbox (0% discount) <ul style="list-style-type: none"> ○ Includes unlimited mailbox & archival storage <p>Bundled Offering:</p> <ul style="list-style-type: none"> ▪ \$99/month
Riskalyze	<p>Solo Edition:</p> <ul style="list-style-type: none"> ▪ \$109 / month for 1 advisor user, 1 non-advisor admin assistant, and 100 client profiles (~15% discount) <p>Team Edition:</p> <ul style="list-style-type: none"> ▪ \$475/month for 10 users and 500 client profiles (~20% discount) <ul style="list-style-type: none"> ○ Add clients for \$1/month/client or add 100 clients & 1 user for \$100/month <p>Autopilot & Compliance Cloud:</p> <ul style="list-style-type: none"> ▪ Pending
Orion Advisor Services	<p>Coming soon!</p>

Contact your TCA Relationship Manager for more information.