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**Full Disclosure:
The Impact of the Final
408(b)(2) Regulation on TPAs**

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SIMIAN SURVEYS AND OTHER PURSUITS



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Downloads
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eBillity
www.ebillity.com

Everyone hates tracking time, especially us. Some professional service businesses have been tracking time for years; others are newer to the concept. Whether you're a plan consultant or a 403(b) advisor, the ability to analyze where your valuable time goes is a powerful tool.

eBillity brings time-tracking to your computer, your Smartphone, and fully integrates into QuickBooks. It's the self-proclaimed simplest and fastest way to track, manage, and bill time. Finally, a turnkey application integrated with QuickBooks that's totally cloud-based and makes tracking time easy.

Whether you want the eBillity software integrated with QuickBooks, or the stand-alone version, this powerful technology is very cost effective. Even the unlimited Premium version is \$39.95 per month, but the good news is you have no contracts, you can cancel at any time, and all data are fully exportable and owned by you. Now the tough part: convincing and training your staff to start logging their time to your customers!

SurveyMonkey
www.surveymonkey.com

In the Spring 2012 issue of *Plan Consultant* we wrote about MailChimp, a very powerful online email marketing tool. Today we bring you SurveyMonkey, an online survey technology that fully integrates with MailChimp to ask your customers how they really feel about the services you provide.

Here's how it works. Set up a user account with SurveyMonkey and link it to your user account with MailChimp. Using SurveyMonkey's powerful design features, you can create as simple or extensive a survey as you want. From "how are we doing" to "what else can we sell you" to "give us feedback," this application is phenomenal for learning more about your customers and their perceptions. The best part about SurveyMonkey is that the basic version is free.

Finally you can ask your customers to complete an easy online questionnaire without using a pen, and can even tell them exactly how long it should take. Create surveys, collect responses, and analyze results. Another silver lining here is that if you want to pay for the premium version of SurveyMonkey, they will even do the work for you. Just fill out a survey of your needs, of course!

Dropbox www.dropbox.com

We also reviewed Box.net in the Spring 2012 issue of *Plan Consultant*. Now it's time to take a look at Dropbox, another of the cloud storage, sharing, and backup services.

First, let's consider some of the similarities. Dropbox offers a free basic account that includes 2 GB of storage space and paid accounts of up to 100 GB for \$19.99 per month. Anything you save or copy into the local Dropbox folder on your computer is automatically synced to your online account and any other computers on which you have installed the software. Install the free app for your iPad, iPhone, Blackberry, or Android, and all your files are instantly accessible. If you make a change on any one of those devices, the updated version is immediately synced to all the others. File sharing? Check. Security and encryption? Check. Workgroup accounts for shared storage and collaboration? Check.

What really sets Dropbox apart from the others, however, is its seamless integration with many other apps and services. Auditorium, the note-taking/voice-recording app, is a great example. Simply type your Dropbox user name and password into Auditorium, and all of your notes and recordings are instantly available on all your devices or to anyone with whom you share your Dropbox folder. GoodReader (see below) is another example. Open a PDF from your account, make changes, highlights, etc., and save. All of your updates are immediately synced. Apart from the storage fees described above, the desktop software and mobile apps are all freebies!

GoodReader www.goodreader.net

As you may have deduced from the Dropbox description, GoodReader allows you to read and mark-up PDF files directly from your iDevice. It also allows you to open and read many other common file types such as Word, PowerPoint, and Excel. Since the app integrates with Dropbox, you can access your files anywhere you can get an Internet connection and all of your changes are automatically synced to your other devices. If you need to work offline, simply download your files in advance and the synchronization will occur the next time you're connected.

When you've finished your review and mark-up, you can email files directly from within the app. One downside is that the app isn't universal, meaning there are two different versions for the iPhone and iPad. But, at only \$4.99 each, you can download both for not much more than the price of a value meal at the closest burger joint.

When you're ready to take a break, cheap tech can help you unwind. Download Band of the Day for your iDevice to get the latest scoop on some great new music. As you might guess, the app features a new band each day, and you can actually listen to a few songs to see what you think. We're talking several entire songs, not just those 15-second clips that cut off at the best part. Not into Emo? Have no fear. The bands cross a variety of genres from jazz to hip hop to that old-time rock and roll and everything in between. By the way, this cheap tech is absolutely free. **PC**

LOOKOUT

Adam and Yannis are always on the lookout for new and creative mobile applications and other technologies. If you have any tips or suggestions, please email them at adam.pozek@dwccconsultants.com and yannis@spectrumpension.com.



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