

1099 BASE TECHNOLOGY BENEFITS INCLUDED

SmartStation® Access – First Clearing, LLC (“First Clearing”) provides multi-factor authentication login credentials to SmartStation®, Pinnacle Investments, LLC (“Pinnacle”) client management, and trading platform.

Initial Training – Pinnacle works directly with First Clearing to provide one-on-one home office training on our programs and systems (combination of training with Tech Team and First Clearing pre-recorded videos). Paired with First Clearing’s “Develop You” and “First Clearing University” each associate can customize their training sessions to best fit their personalized training needs.

Email Access Options – Pinnacle offers web and mobile device access to our email platform/ Microsoft 365 via desktop PC, laptop, cell phone, tablets, iPads, etc. Through Proofpoint Secure, users can easily send secure, encrypted emails to protect any sensitive or confidential information. Users also have the option to utilize CellTrust for SMS-compliant text messaging.

Web Portal – Access to OurPinnacle.com where all members of our organization can view important updates on past, and present happenings across the Pinnacle Family of Companies. Also, located on OurPinnacle.com is the company directory, the Resource Tab, where important documents and materials are stored, as well as the real-time Commission tracking and client notetaking system.

DocuPace – Pinnacle’s internal, electronic document workflow system that provides a direct line of communication between the compliance department, operations, and client service associates. This internal system assists in streamlining the review of important documents so you will always be in the know.

PINNACLE TECH TEAM SERVICES

THE FOLLOWING ARE INCLUDED FOR AN ADDITIONAL \$120/USER PER MONTH

Technical Supplies – Pinnacle offers an easy “plug & play” option for all technology needs. We will work with you to find the supplies (e.g., Computers, monitors, phones etc.) that best suites you, program it with all the tools necessary and ship it direct to your office. All you will have to do is plug it in.

License Management – Pinnacle will manage your Microsoft and Office 365 subscriptions, so you can spend more time on your clients.

Antivirus and Malware Protection – Security is important to us, so Pinnacle Tech Team will ensure your device is protected. Get up to date antivirus, malware protection and frequent security scans via TrendMicro.

Software Updates – Pinnacle will provide up to date tracking and installation of necessary updates and software patches to ensure your machine is running at its best.

24/7 Remote Support – Access to remote support from a team who knows Pinnacle, as well as the ability to leverage our Managed Service Provider should the need arise. Simply open a ticket by emailing TechTeam@Pinnacle-LLC.com and we will address your needs as soon as possible.

Access to Pinnacle’s IT Vendor Network – From our MSP, Managed Print Provider, phones; our IT Vendor network is your network too! Pinnacle Tech services gives you access to all these Vendors, and we are happy to work with any of your existing vendors as well.

TECH TEAM ADD ONs

ADDITIONAL SERVICES, BILLED INDIVIDUALLY BASED ON USAGE

Managed Printing Services – Never worry about printing supplies again. Pinnacle can provide a metered printer with automatic supply refill tailored to your printing needs.

Dedicated VoIP Business Phone Number – Pinnacle can provide a direct business number via hard phone or soft phone. With our VoIP system, our main office can handle any incoming calls and direct customers to the appropriate contact.

DISCLAIMER: If you elect to hire a different IT provider, the rep and/or their contracted IT vendor will be responsible for all IT related work NOT listed in the INCLUDED 1099 HIRE TECHNOLOGY BENEFITS section. Denial of Tech Team Services is an acknowledgment by the rep that Pinnacle Tech Team is ONLY responsible for the services listed in the INCLUDED 1099 HIRE TECHNOLOGY BENEFITS section. Any purchasing, installation, maintenance, or troubleshooting scenario related to items NOT listed in the INCLUDED 1099 HIRE TECHNOLOGY BENEFITS section will be the sole responsibility of the rep and/or their contracted IT vendor.