

Dear VFM User,

Vision Financial Marketing will be shutting down our CRM & Direct Mail platform on September 1, 2021. Thank you so much for your support over the past four years that we've been offering the platform.

Please continue reading to learn more about the next steps you should take to export and migrate your data.

We understand that it's a pain to deal with services shutting down and transitioning to a new system. This was not a decision that we made lightly. After investing continuous time and resources into the product over the past year, we've made the decision to discontinue the service in September due to a combination of factors.

We will do our best to make the export of your data out of VFM as smooth of a process as possible. A full backup of your CRM data will be available until September 1st. After that date, backups will discontinue and access to the site will no longer be available. Paid customers will not be charged after that date.

Next Steps for You:

1. If you would like to download an export of your data, the **Account Owner** can login and then use the Account Settings dropdown menu in the top right corner and select > "Request Backup".
2. This will send a request to our development team to prepare your backup.
3. **Please Note:** Backups are run each morning on Tuesdays. You can request your backup at any time; however, the backup will not be made available until the next Tuesday after your request. E.g., if you submit your request for a backup of your data on Thursday the 15th, the next backup will run on Tuesday the 20th and your export will be made available shortly after that.
4. Following that Tuesday, a unique download link to a .Zip file containing CSV files of all CRM data for your account will be emailed to you.

For those of you in need of a new CRM system, here are some alternative services that we suggest you explore:

- [Wealthbox](#): a modern CRM for financial advisors
- [Redtail](#): the first cloud-based CRM for financial advisors

If you have additional questions or concerns, email us at support@vfteam.com and we'll do our best to help.

Thank you again for your support over the years and we are wishing you well.

Sincerely,

Vision Financial Marketing