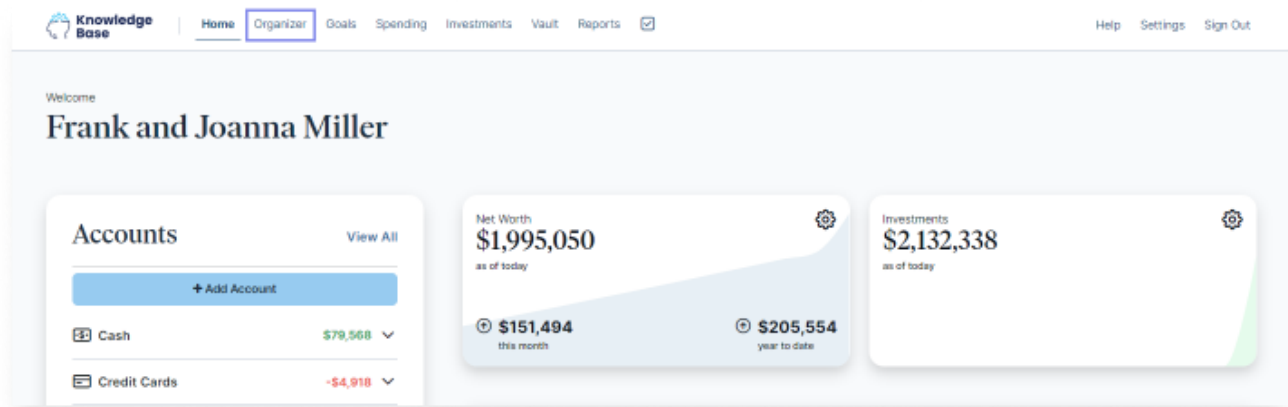


# Organizer Overview

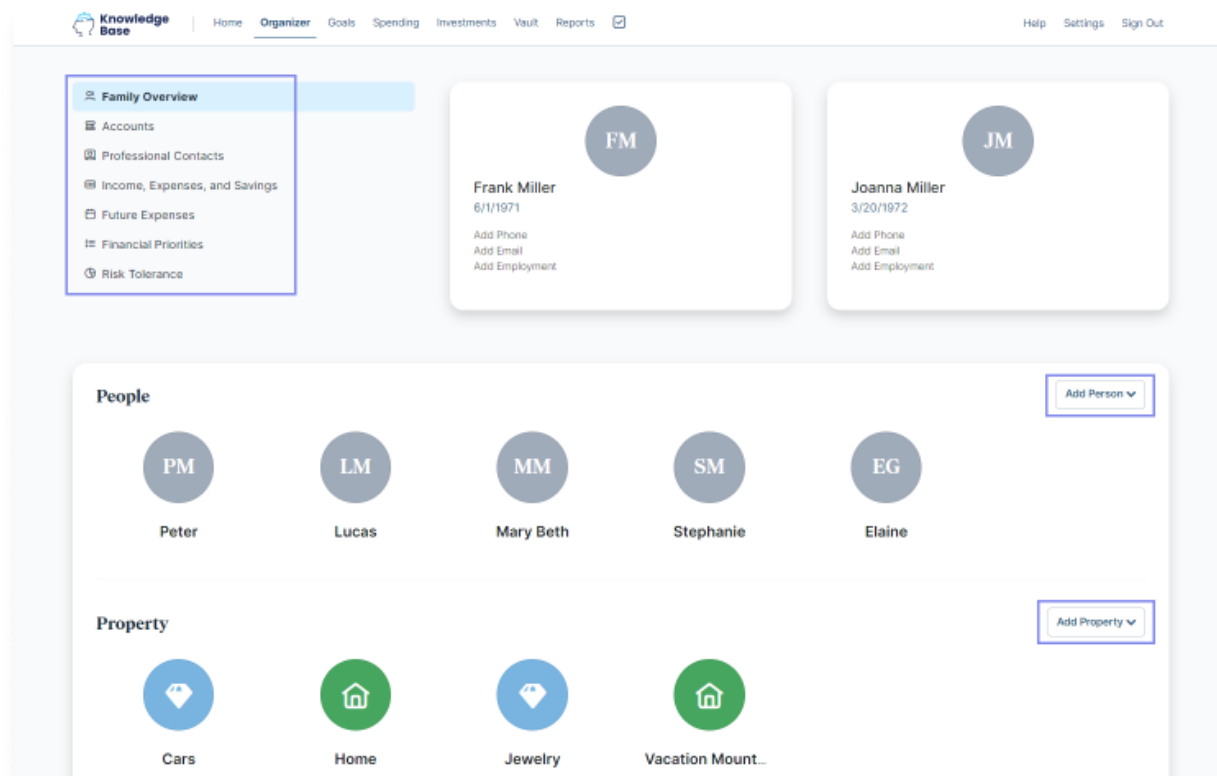
This User Guide details the features of your Client Site Organizer.

Use the Organizer to group all your financial information in one place. Click the different sections to add and edit the related information. The information included here will be used to populate other areas of the application, including the Home page.

1. From the Home page, click Organizer on the top navigation bar.



2. The Organizer allows you to group all your financial information in one place, as seen below. The menu options list out the available sections you can view and modify by clicking into each



section.

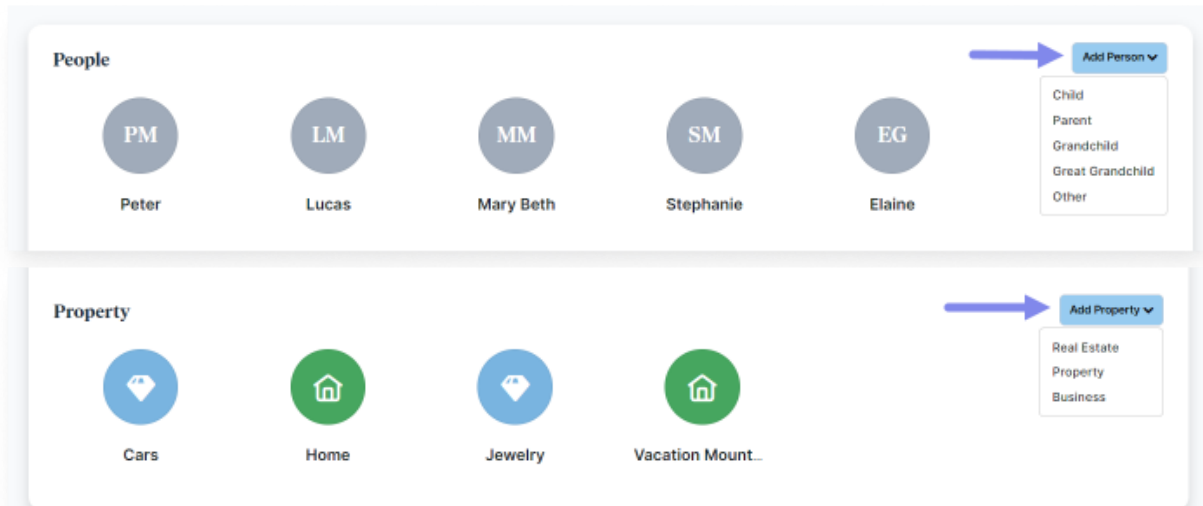
3. To modify any of your personal information, click your name from the Organizer Overview page. Click the profile image icon to upload a profile picture of yourself. Click the pencil icons on the Contact or Employment tiles to edit these details and use the Add Document button to upload relevant documents to your Vault. The Add Document feature is available within certain Organizer entries.

The screenshot displays the 'Organizer' section of the Knowledge Base. At the top, a navigation bar includes 'Home', 'Organizer', 'Goals', 'Spending', 'Investments', 'Vault', and 'Reports'. A sidebar on the left lists categories: Family Overview, Accounts, Professional Contacts, Income, Expenses, and Savings, Future Expenses, Financial Priorities, and Risk Tolerance. The main area shows two family member cards: Frank Miller (DOB: 6/1/1971) and Joanna Miller (DOB: 3/20/1972). Below this, the 'Frank Miller' profile is expanded, showing a 'PERSONAL INFO' card with details like 'Jun 01, 1971 (Age 52)' and 'Spouse: Joanna Miller'. To the right are sections for 'Contact' and 'Employment', both indicating no info has been added yet. At the bottom is a 'Documents' section with an 'Add Document' button and a table with columns for 'Nick Name', 'File Name', and 'Last Updated'.

## Note

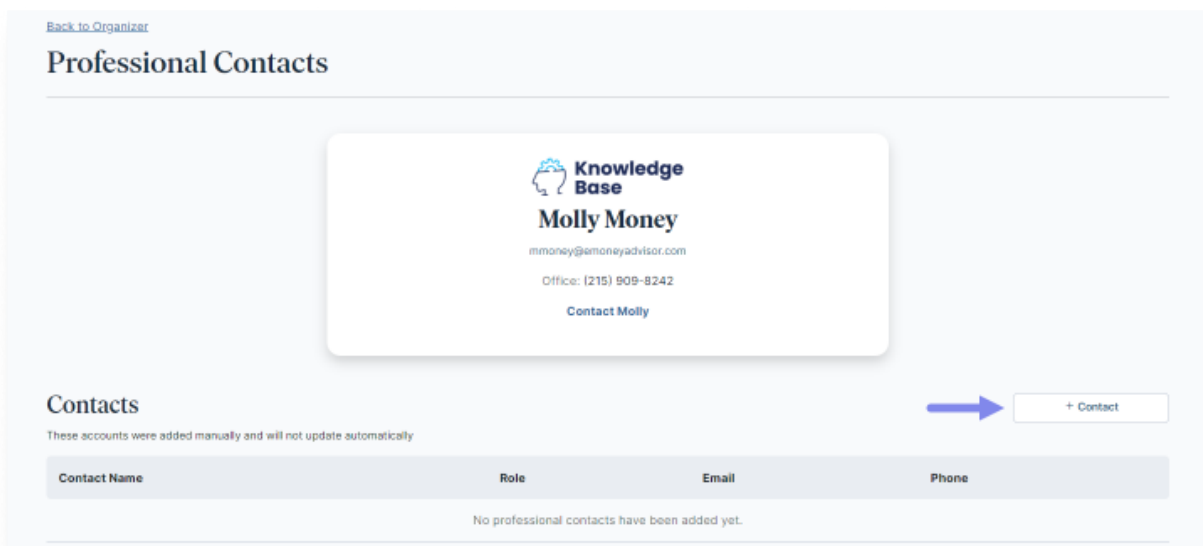
- Basic Info: First and Last Name, DOB, Gender, Special Needs, Health Status, Marital Status
- Contact Info: Email, Phone, Mobile, Fax, Address. Only Mobile number will display on

4. On the main Organizer tab, you can add relevant People and Property. Click the Add Person drop-down to add a person and enter details. You can upload a picture of each person on their individual page. Click the Add Property drop-down to add Real Estate, Property, or a



Business.

5. Professional Contacts allows you to add information on key contacts. Your advisor will always be listed first in this section. Click the + Contact button to add a contact.



- Income, Expenses, and Savings contains your Annual Income, Living Expenses, and Contributions and Savings.

[Back to Organizer](#)

## Income, Expenses, and Savings

### Annual Income

[+ Income](#)

Income	Value
<a href="#">Frank's Earnings</a>	\$300,000
<a href="#">Joanna's Hospital Pension</a>	\$12,000
<a href="#">Joanna's Part-Time Earnings</a>	\$50,000

### Annual Living Expenses

[+ Expense](#) [+ Estimate from Spending](#)

Total Annual Expenses

Essential Expense Percentage

### Annual Contributions and Savings

[+ Savings](#)

Savings	Value
<a href="#">Frank's 401(k) Contribution</a>	\$39,000

- Future Expenses allows you to add retirement goals, education goals, and any major expense goals. Click the + Expense button to add an expense.

[Back to Organizer](#)

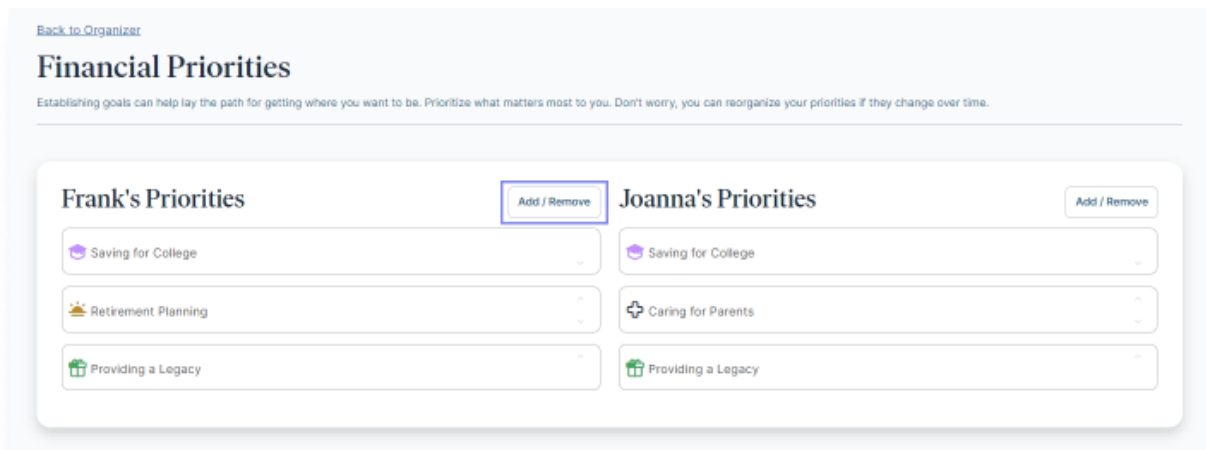
## Future Expenses

### Major Expenses

[+ Expense](#)

Expense	Value
<a href="#">New Car - Frank</a>	\$56,000

8. Financial Priorities are used to help create an accurate view of your plans regarding your finances. Here, you can assign an order to your financial goals. Click Add/Remove to edit your Financial Priorities.



9. Risk Tolerance provides a 12-question questionnaire. You need to answer all 12 questions in full to see your risk score.

