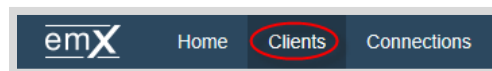


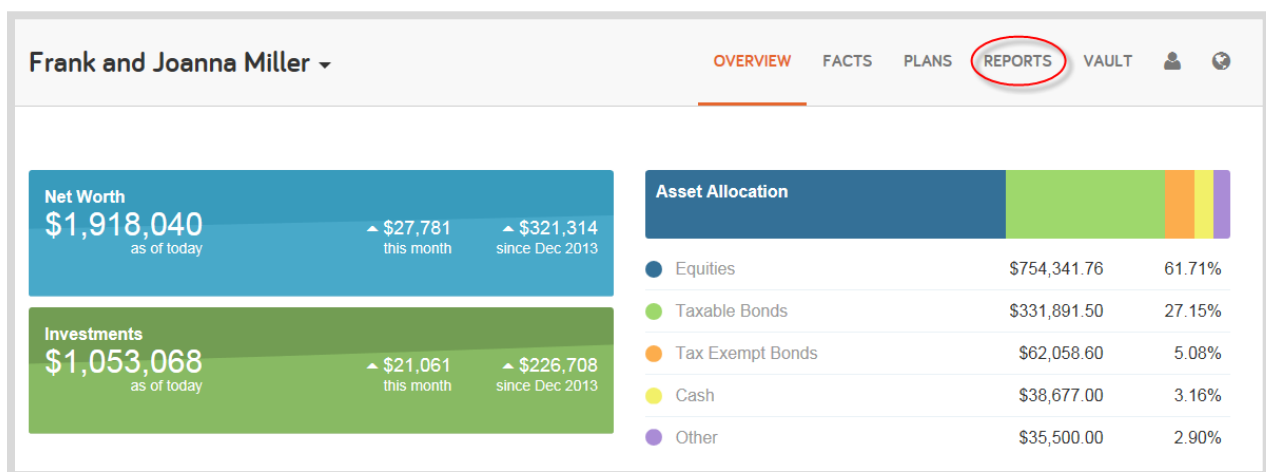
This training guide will demonstrate a Presentation Center Overview.

The presentation center allows the advisor to create a formal presentation of a report (or reports) and/or modify existing presentations.

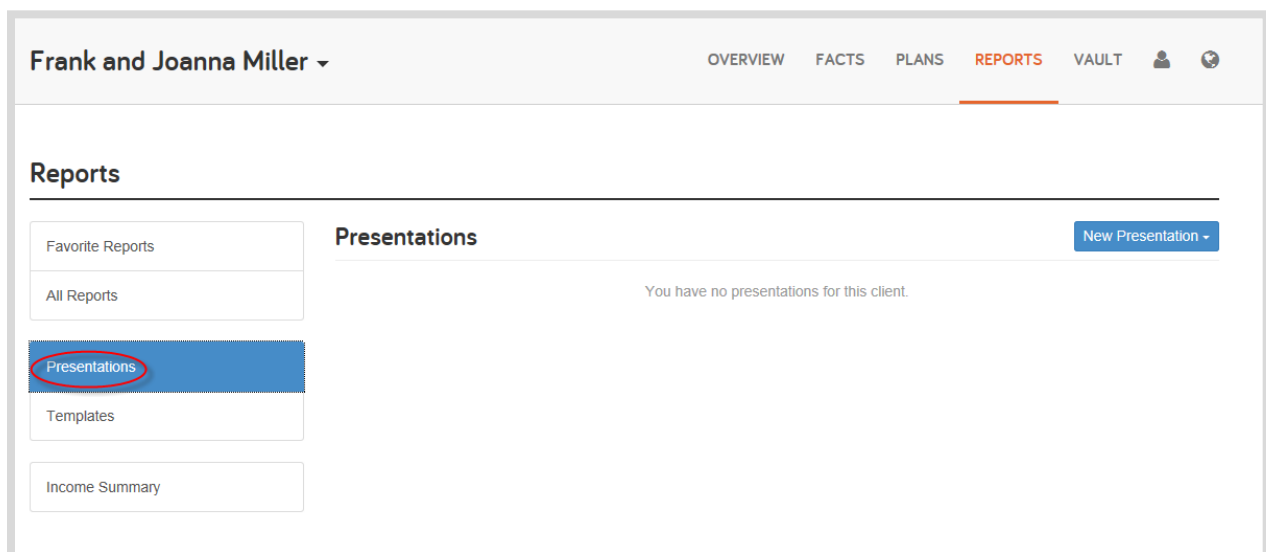
1. Click on **Clients** and choose a client.



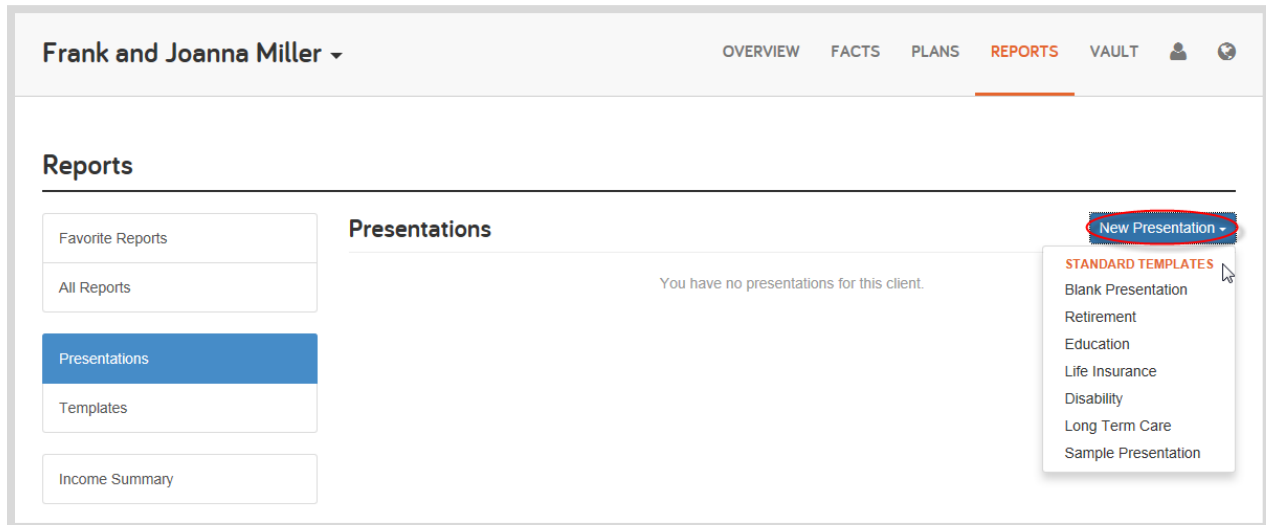
2. From the Client Overview, click **Reports**.



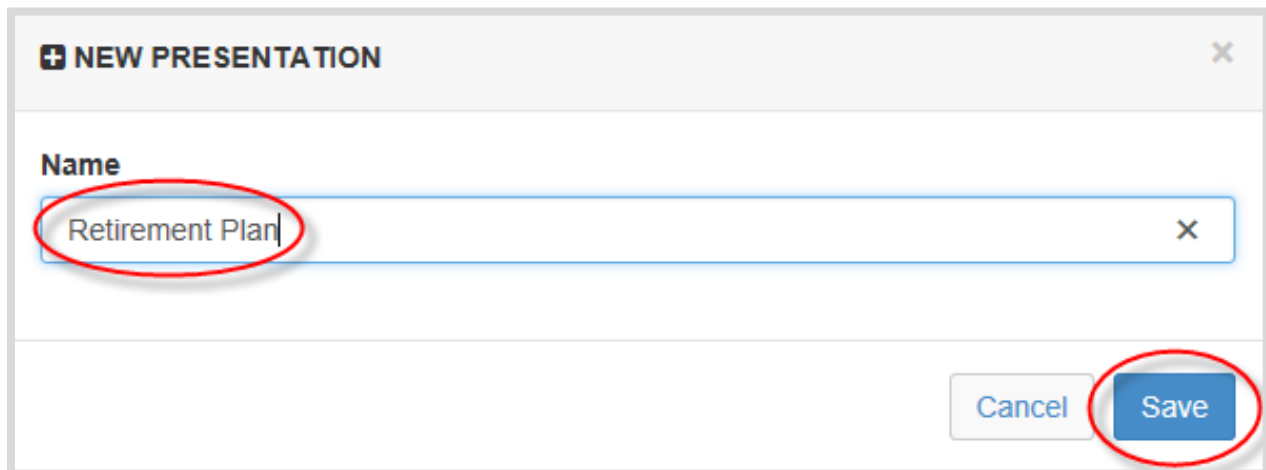
3. Click **Presentations**.



- To create a New Presentation, click **New Presentation** and select a template from the dropdown menu.



- Name the presentation and click **Save**.



- Click **Title** and enter a presentation title. Click **Save**.

Go back to Reports

Retirement Plan

Contents
 Title
 Broker Dealer Footer

Use the controls below to change the Name or Title of the presentation.

Presentation Name: Retirement Plan

Presentation Title: Retirement Plan

Please Note: Presentation Name is the name of the presentation template that will show in the Vault/Reports folder for the client. Presentation Title is the title that will appear on the cover sheet of presentations generated from this template.

- To select which broker dealer footer to use, click **Broker Dealer Footer**.

Please Note: The broker dealer footer is entered under the Broker Dealer Tab in Settings.

Go back to Reports

Retirement Plan

Contents
 Title
 Broker Dealer Footer

The *Retirement Plan* presentation contains the following items:

- Cover Sheet
Base Facts
- Table of Contents
Base Facts
- Disclaimer
Base Facts

Drag a row to re-order the list above.

Add New Page

Introduction / Blank Page
 --- select ---

Add New Chapter

--- select ---

- Click the dropdown next to Broker Dealer Footer to select **None**, **Footer 1**, or **Footer 2**.

Go back to Reports

Retirement Plan

Contents Title Broker Dealer Footer

Use the controls below to change the broker dealer footer used by the the presentation.

Broker Dealer Footer: **None** ▼

Text:

Abbr. Text:

Save Cancel

- Once the correct footer is chosen, click **Save**. The screen will then show the contents of the presentation.

Go back to Reports

Retirement Plan

Contents Title Broker Dealer Footer

Use the controls below to change the broker dealer footer used by the the presentation.

Broker Dealer Footer: **Footer1** ▼

Text:

Abbr. Text:

Save Cancel

10. Select **Add New Page/Add New Chapter** from the dropdown and click **Add Page/Chapter**.

Please Note: Add New Page allows the advisor to include any of the client-facing reports within the Reports Center. Add New Chapter will include a prebuilt chapter consisting of several reports with a similar theme.

11. Click the **Report Name** to rename the report or change the scenario.

12. From this page, reports can be configured by selecting a Plan, a What-if and/or Compare To Plan or What-if.

Retirement Plan

Cash Flow

Use this page to configure the *Cash Flow* report.

Title:

Scenario:

Compare To:

Content:

Year:

View:

Actions:

- View Online Presentation
- Request Printable Presentation

13. To View an Online Presentation, Request a Printable Presentation, Rename the Presentation, or Save as a Template, click the corresponding links under Actions.

Retirement Plan

The *Retirement Plan* presentation contains the following items:

- Cover Sheet (Base Facts)
- Table of Contents (Base Facts)
- Disclaimer (Base Facts)
- Cash Flow (Base Facts (All Years))
- Current Financial Condition (9 items)
- Asset Allocation Overview (4 items)
- Retirement (7 items)

Drag a row to re-order the list above.

Actions:

- View Online Presentation
- Request Printable Presentation
- Rename this Presentation
- Save as a Template
- Save as an Office Template

Please Note: To Edit the Order of the Presentation, drag and drop the page icons to a new location in the list.

14. To send this presentation to the Reports folder in the client vault, click **Request Printable Presentation**.

The screenshot shows the 'Retirement Plan' presentation interface. On the left is a navigation pane with 'Retirement Plan' selected. The main area lists the presentation's contents, including 'Cover Sheet', 'Table of Contents', 'Disclaimer', 'Cash Flow', 'Current Financial Condition (9 items)', 'Asset Allocation Overview (4 items)', and 'Retirement (7 items)'. On the right, there are options to 'Add New Page' and 'Add New Chapter'. Below these is an 'Actions' menu where 'Request Printable Presentation' is highlighted with a red circle.

15. Complete the appropriate fields and click **Print**.

The screenshot shows the 'Print Request for Retirement Plan' form. It includes a printer icon and the instruction: 'Select the options for your print request and then click the **Print** button.' The form fields are: Document: Retirement Plan; Prepared By: Erin Derryberry; Format: Microsoft Word Document (*.doc); Quality: High Quality; Notification E-mail: erind@emoneyadvisor.com. At the bottom, there are 'Cancel' and 'Print' buttons, with the 'Print' button circled in red.

16. Once processed, the document will be sent to the client vault in the Reports folder. From the client vault, the file may be downloaded and printed, or it may be made visible to the client.