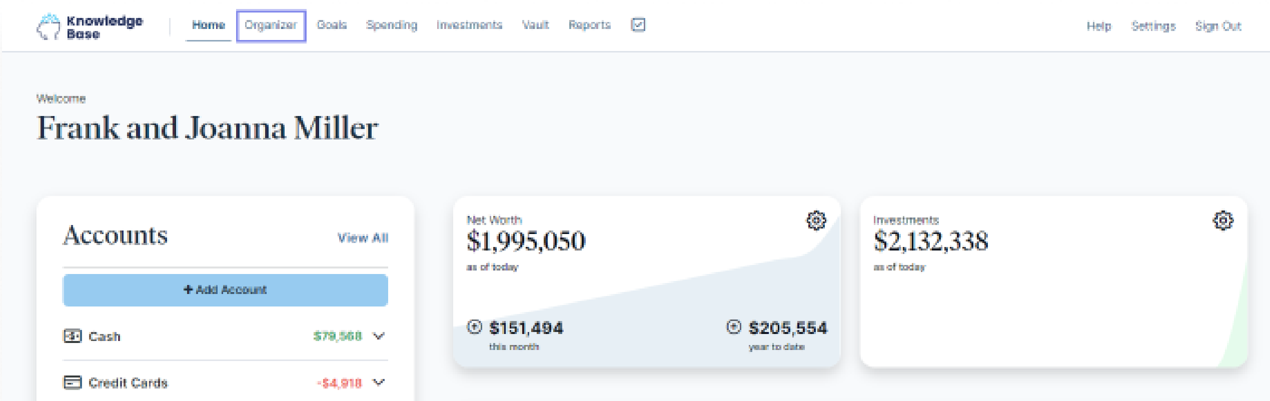
Organizer Overview

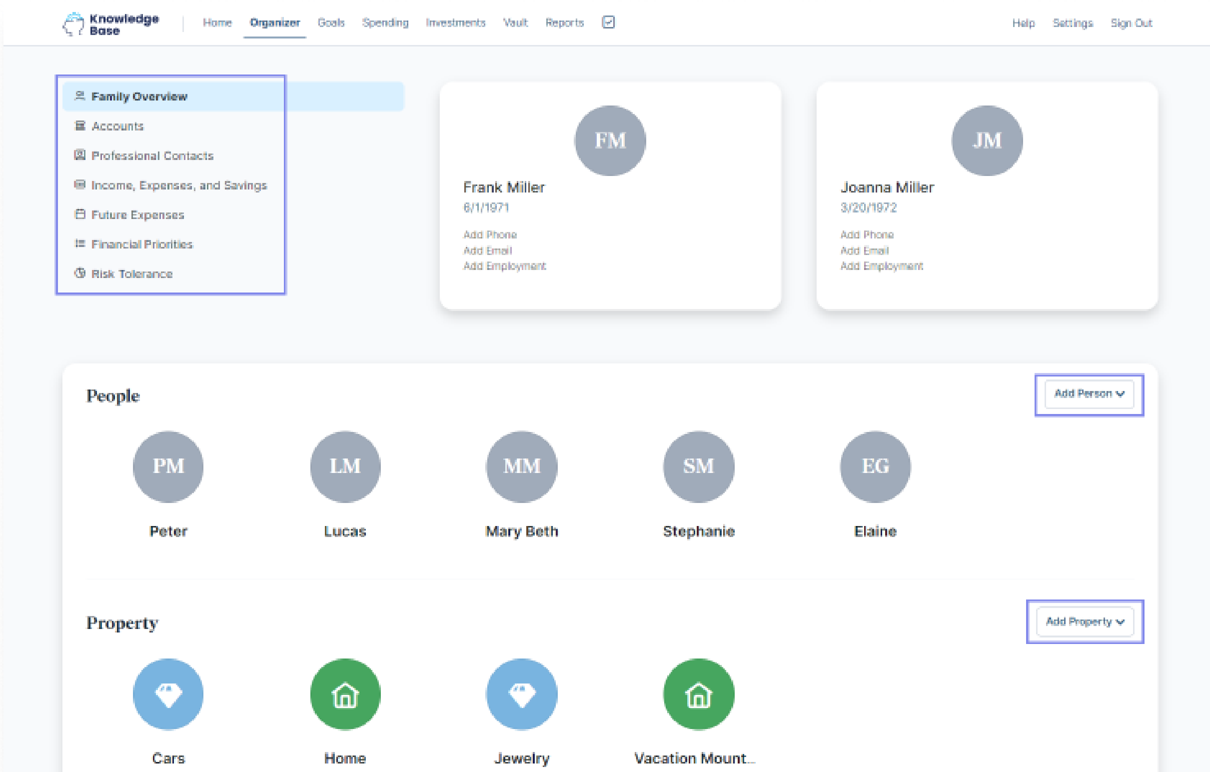
This User Guide details the features of your Client Site Organizer.

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.

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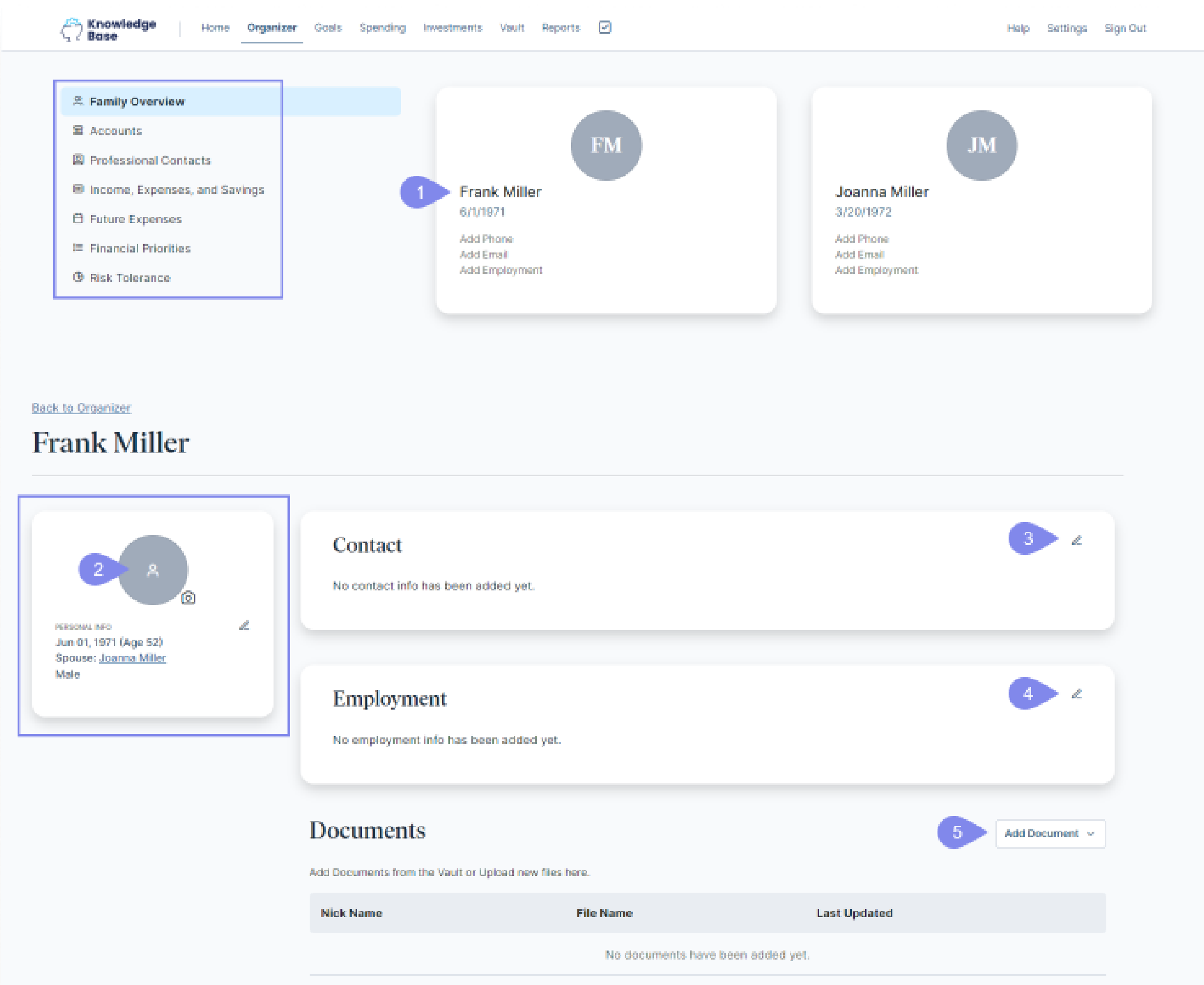
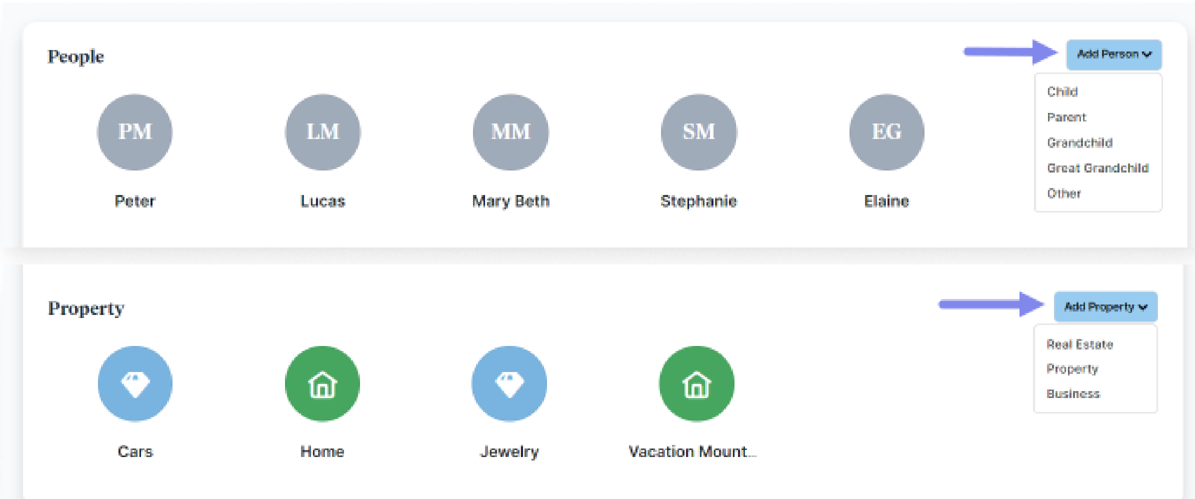


Note

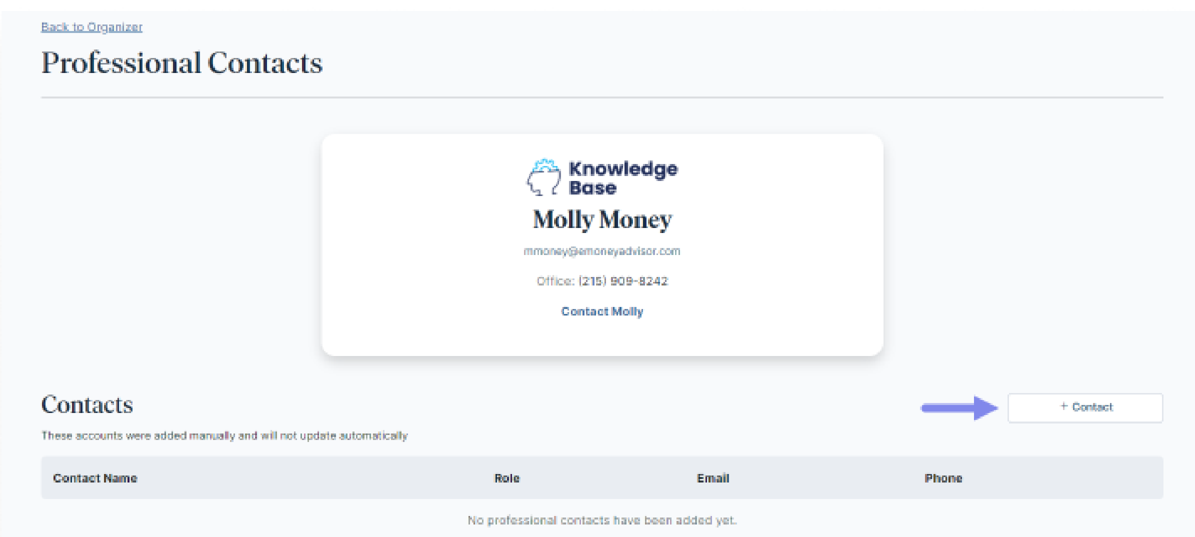
- Basic Info: First and Last Name, DOB, Gender, Special Needs, Health Status, Marital Status
- Contact Info: Email, Phone, Mobile, Fax, Address. Only Mobile number will display on

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

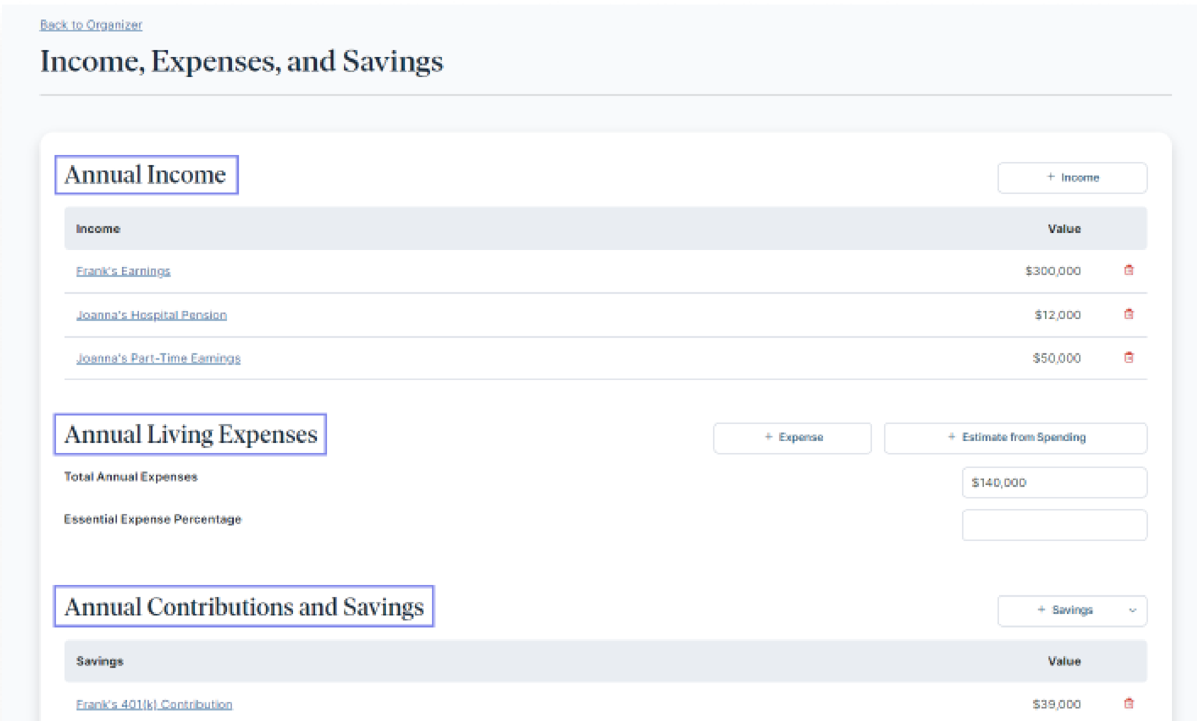


Business.

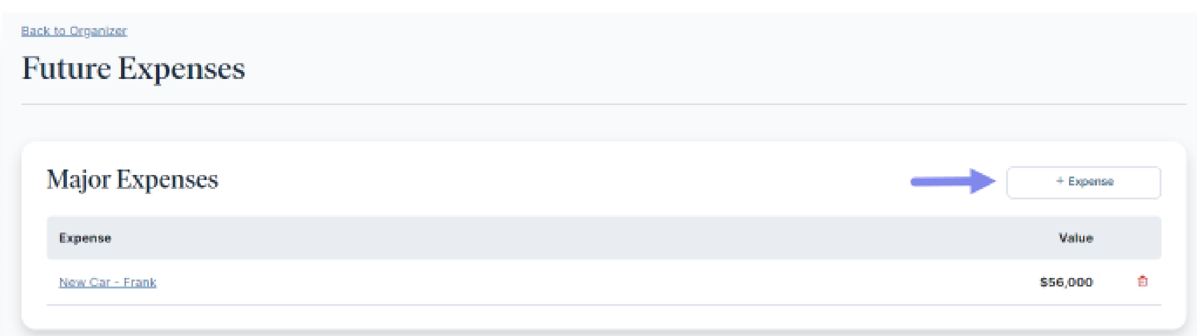
5. Professional Contacts allows you to add information on key contacts. Your advisor will always be listed first in this section. Click the + Contact button to add a contact.



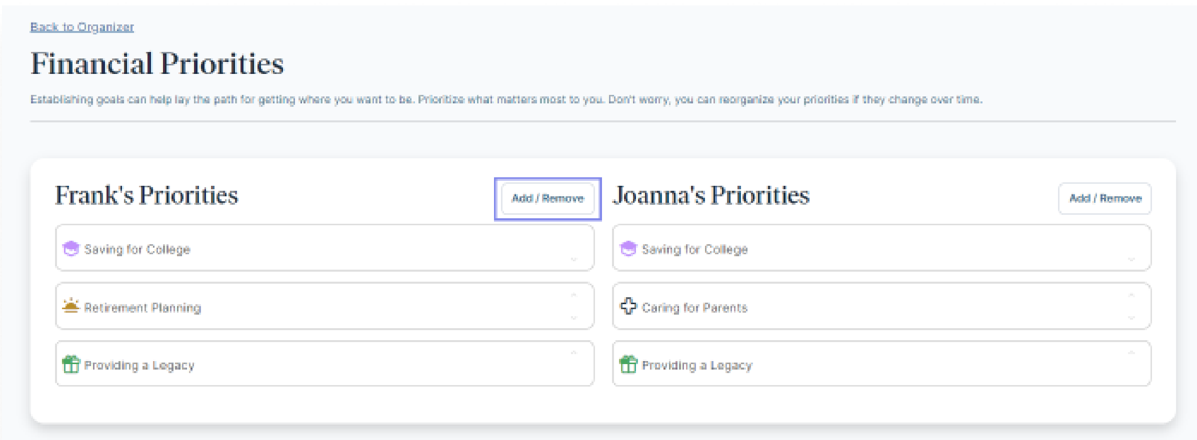
6. Income, Expenses, and Savings contains your Annual Income, Living Expenses, and Contributions and Savings.



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



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.