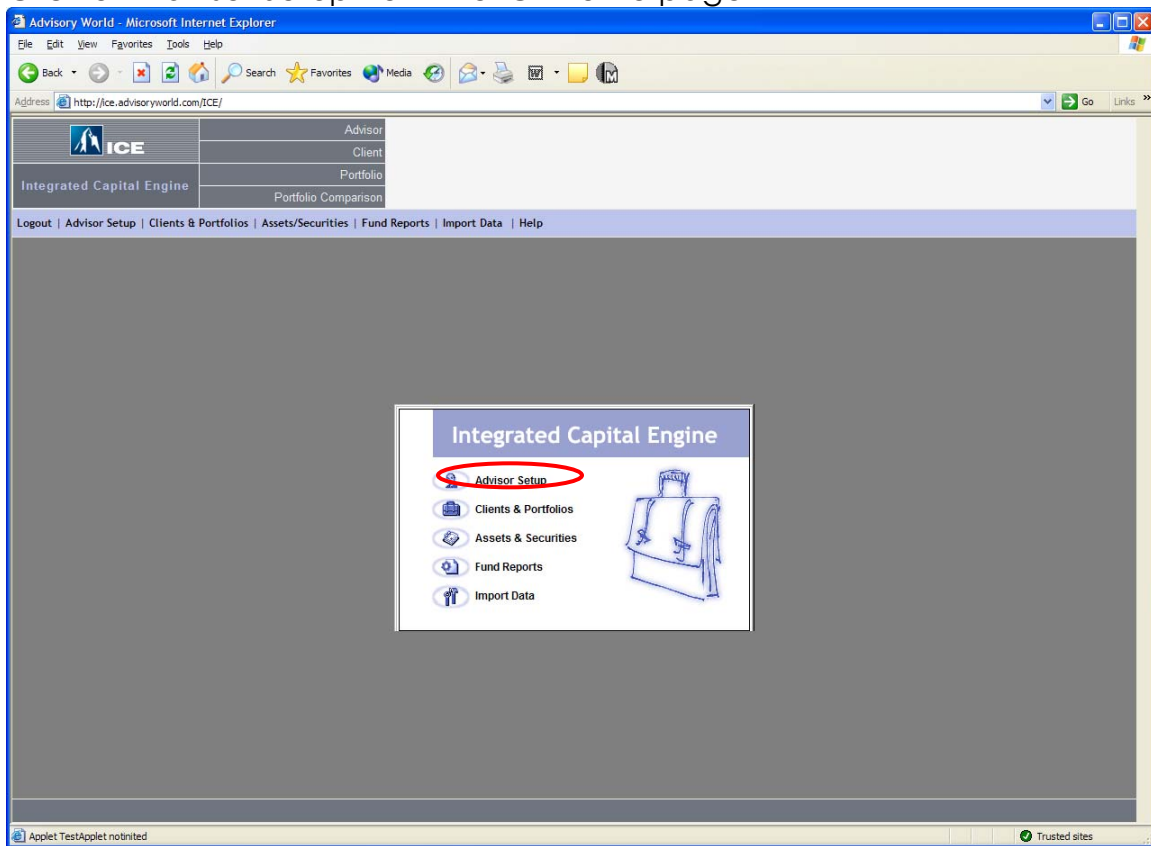


How to add your logo to ICE reports

Click on Advisor Setup from the ICE home page



Click on Reports & Plugins
→ Click on Report Settings

Advisor Setup - Microsoft Internet Explorer

Personal Info | Contacts | Standard Advisor Fees | **Reports & Plugins** | Permissions | Change Password

Reports Available

<input checked="" type="checkbox"/> Investment Policy Statement	<input checked="" type="checkbox"/> Disclosure Statement
<input checked="" type="checkbox"/> Portfolio Review	<input checked="" type="checkbox"/> Portfolio Overview
<input checked="" type="checkbox"/> Summary Report	<input checked="" type="checkbox"/> Portfolio Comparison
<input checked="" type="checkbox"/> Questionnaire	<input checked="" type="checkbox"/> Completed Questionnaire
<input checked="" type="checkbox"/> Portfolio Cash Flow	<input checked="" type="checkbox"/> Monte Carlo Simulation
<input checked="" type="checkbox"/> Hypothetical Performance	<input checked="" type="checkbox"/> Overview

Tables Available

<input checked="" type="checkbox"/> Portfolio Recommendation	<input checked="" type="checkbox"/> Portfolio Rates of Returns
<input checked="" type="checkbox"/> Portfolio Values	<input checked="" type="checkbox"/> Asset Class Information
<input checked="" type="checkbox"/> Asset Class Statistics	<input checked="" type="checkbox"/> Comparison Implementation
<input checked="" type="checkbox"/> Portfolio Implementation	<input checked="" type="checkbox"/> Portfolio Asset Returns
<input checked="" type="checkbox"/> Portfolio Correlations	<input checked="" type="checkbox"/> Portfolio Status
<input checked="" type="checkbox"/> Monthly RORs	<input checked="" type="checkbox"/> Growth of a Dollar
<input checked="" type="checkbox"/> Rolling Period RORs	<input checked="" type="checkbox"/> Efficient Frontier Portfolios

Graphs Available

<input checked="" type="checkbox"/> Asset Mix/Pie	<input checked="" type="checkbox"/> Risk vs. Return Matrix
<input checked="" type="checkbox"/> Rate of Returns Bar	<input checked="" type="checkbox"/> Standard Deviation Bar
<input checked="" type="checkbox"/> Range of Returns Bar	<input checked="" type="checkbox"/> Range of Values Bar
<input checked="" type="checkbox"/> Monthly RORs Graph	<input checked="" type="checkbox"/> Dollar Growth Graph
<input checked="" type="checkbox"/> Rolling RORs Graph	<input checked="" type="checkbox"/> Boundary of Returns Graph
<input checked="" type="checkbox"/> Portfolio Performance	<input checked="" type="checkbox"/> Efficient Frontier Graph

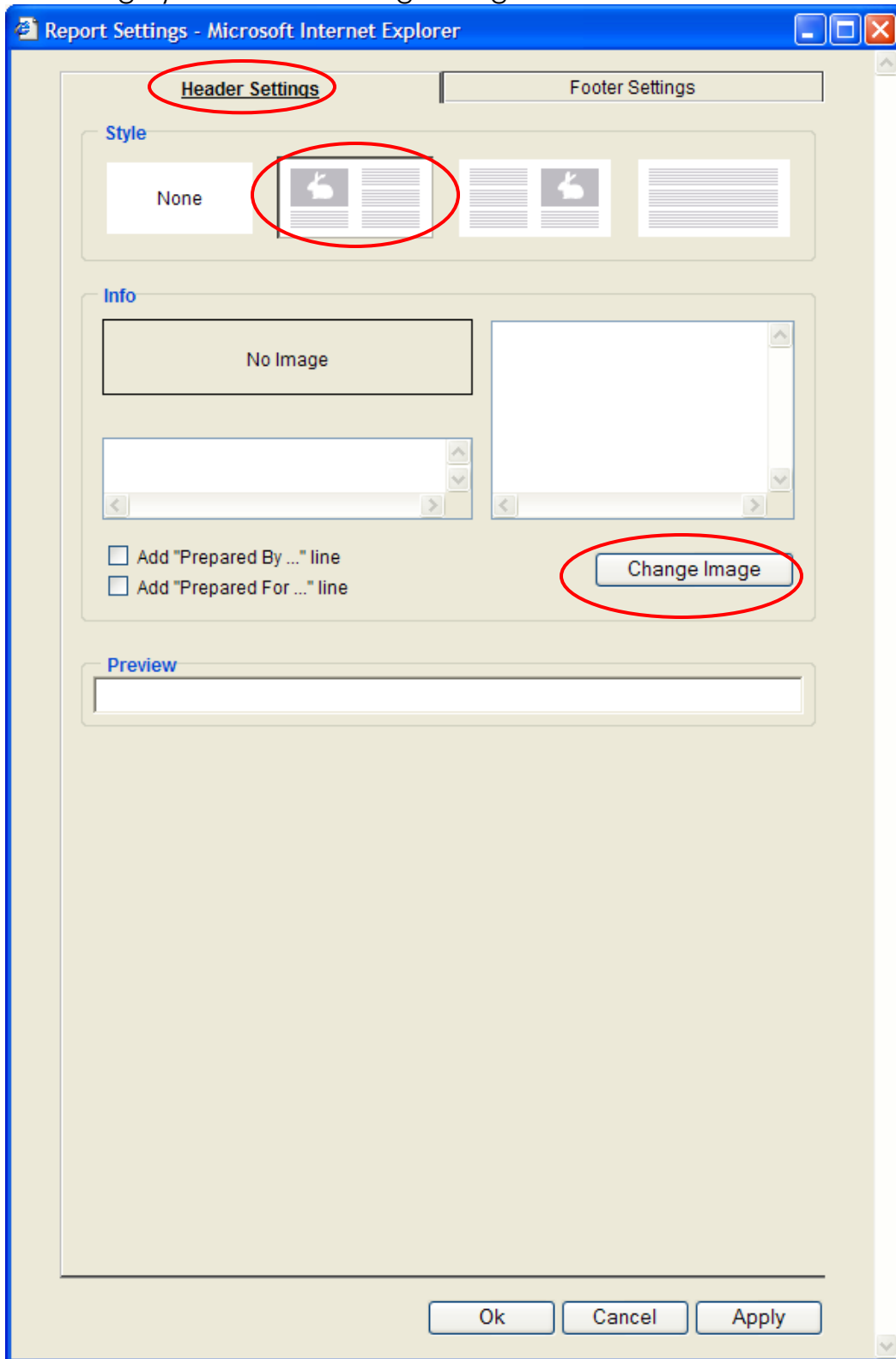
Plugins Available

Efficient Frontier

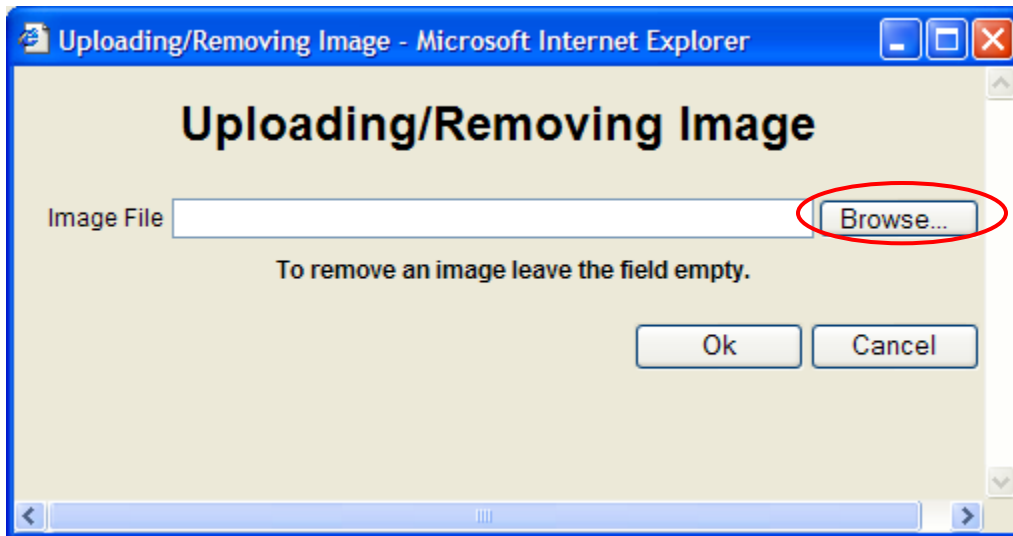
Report Settings

Ok Cancel Apply

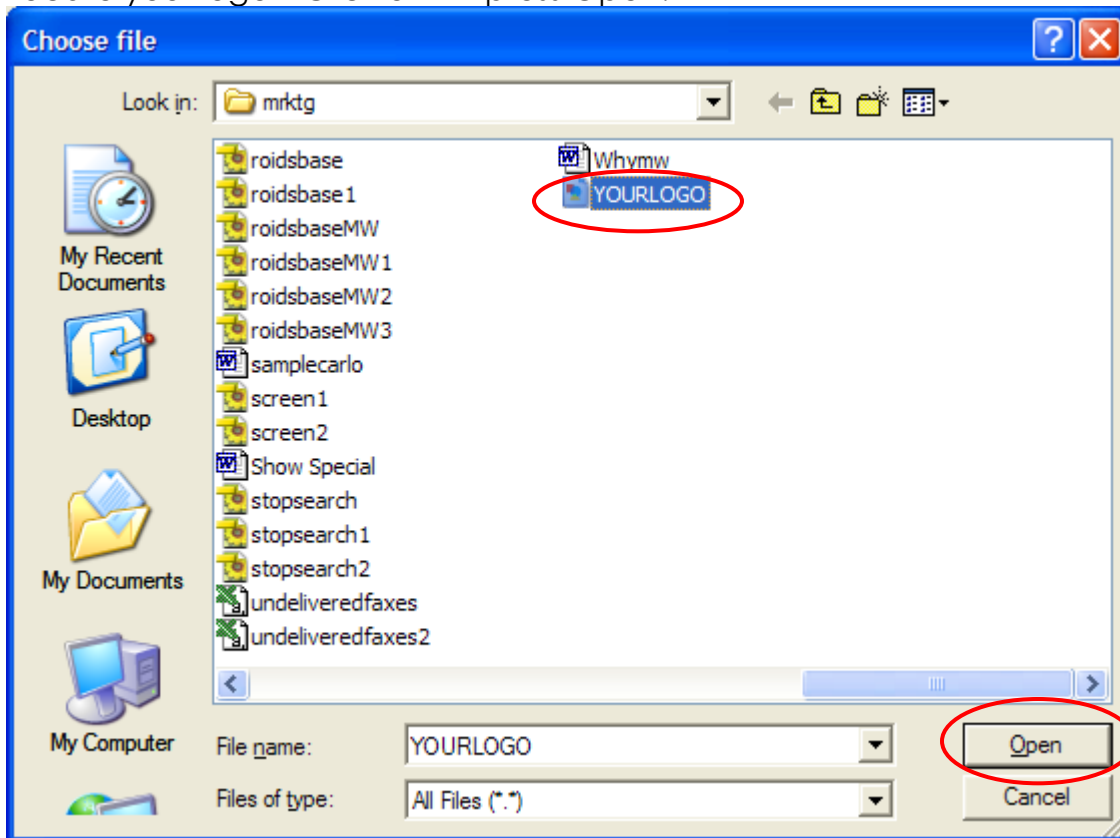
Select where you would like your logo positioned (ie. Header or Footer, Left or Right) → Click on Change Image



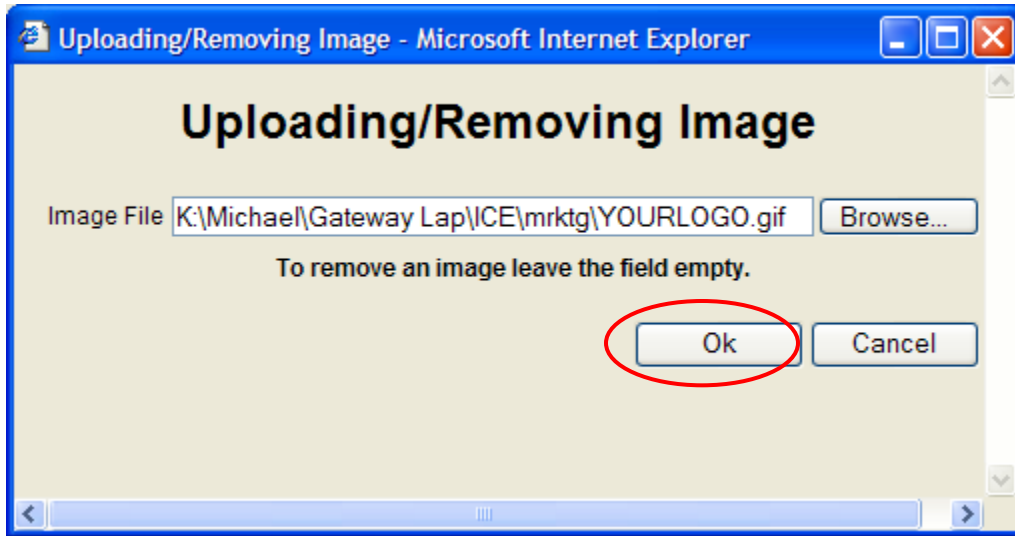
Click on Browse



Locate your logo → Click on it → press Open.



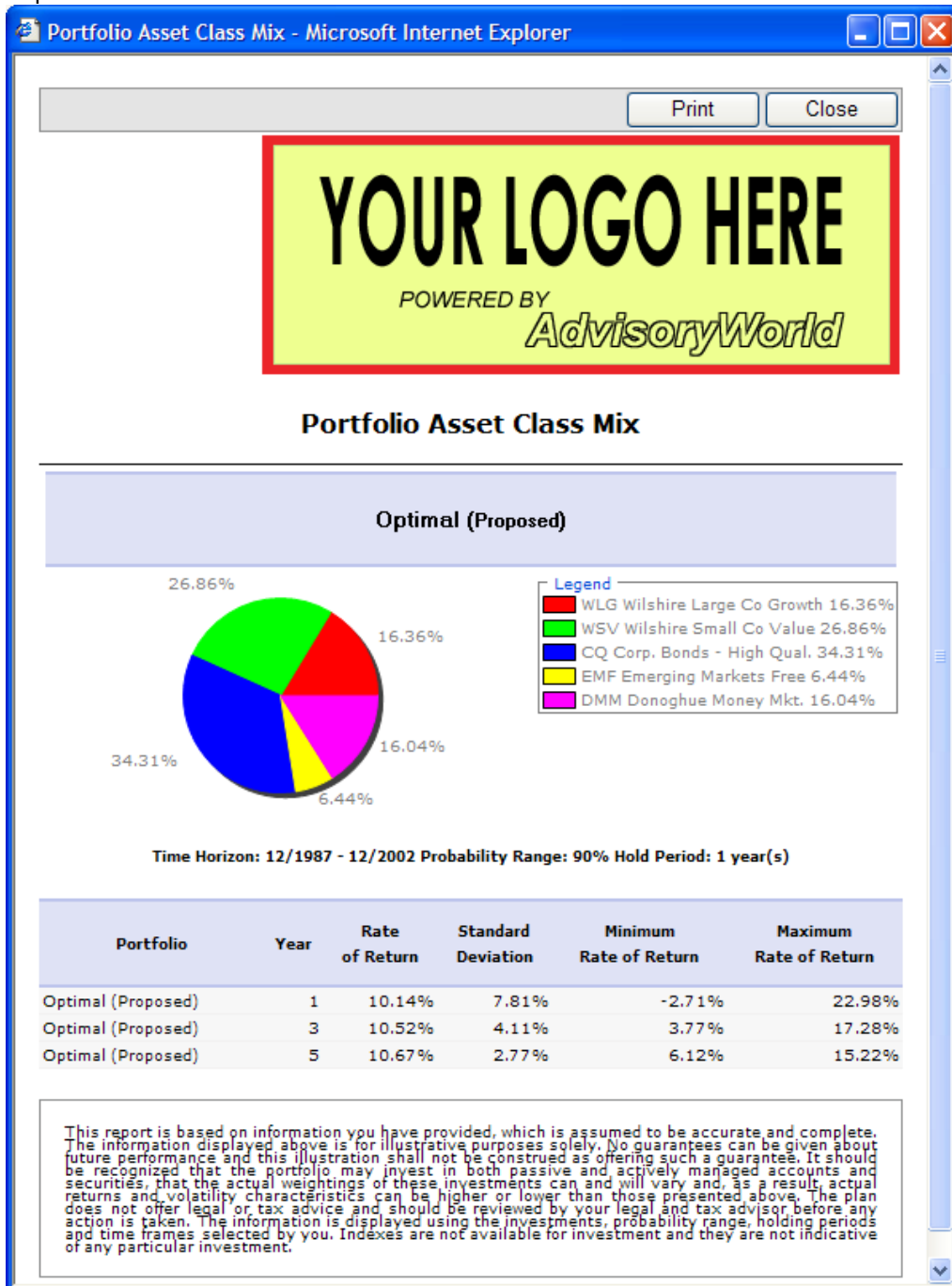
Click OK



You should be able to preview your logo as seen here. Press OK



Your logo will now be viewed, printed, emailed and even shared with reports.



If you have any questions about this or any other feature of ICE please contact AdvisoryWorld.

tech@advisoryworld.com | 818-999-0015