ADVISORYWORLD

Advisor Proposal Generator

Getting Started

After logging in, Press the New Proposal button

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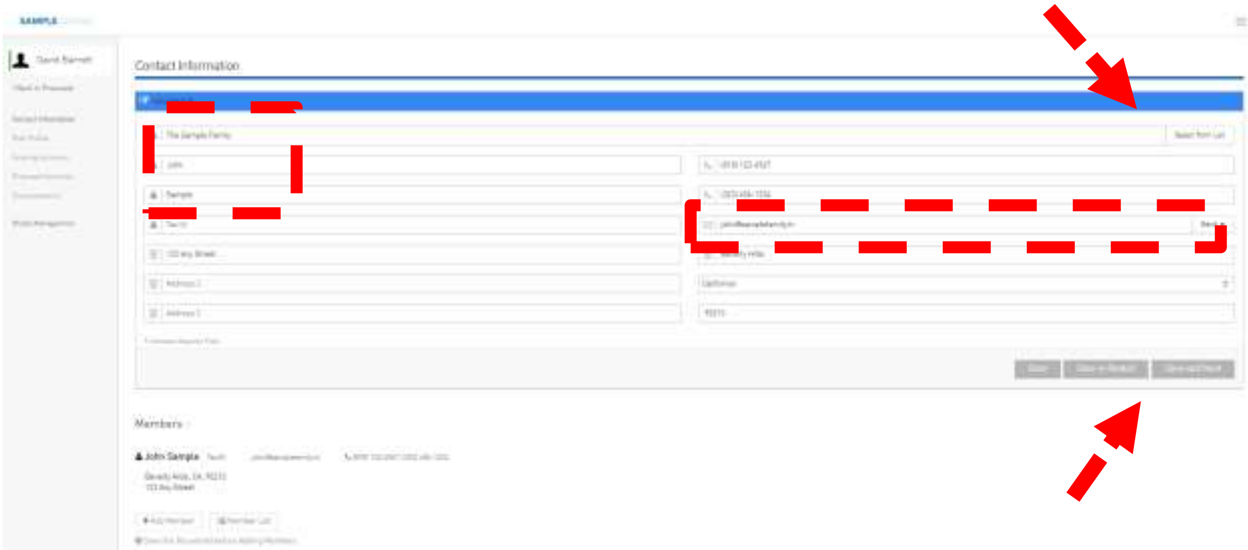

Either press the Select from list button to choose a previously entered Household or enter information regarding the Household and its Primary Member including the Household Name and the Primary Member's First and Last Names. If a Primary Member's email address is entered, users have the option to send the Risk Profile Questionnaire directly to the Primary Member for completion.

Press Save & Next

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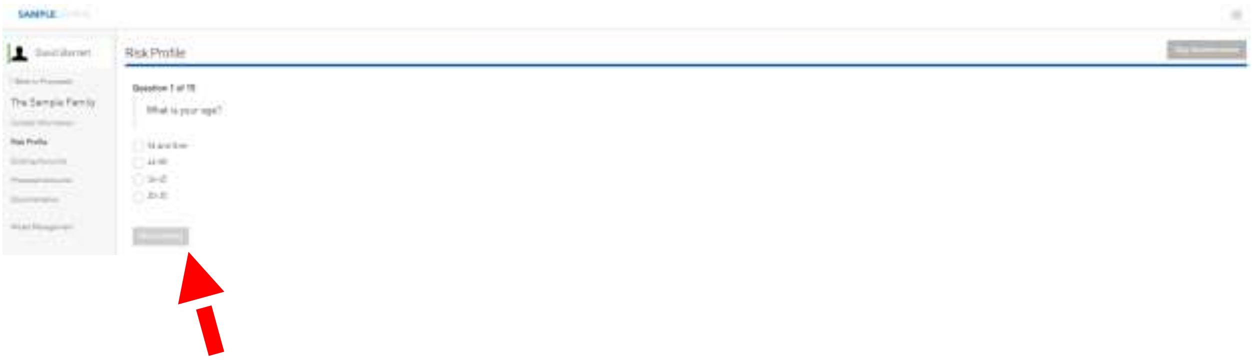
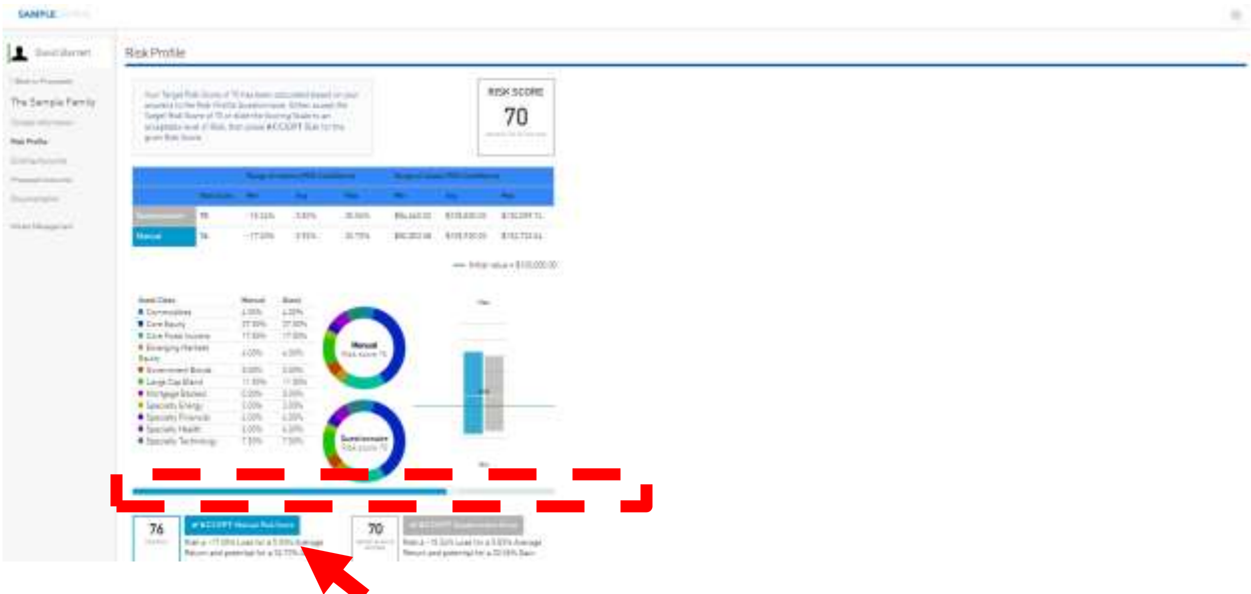
Enter an answer for each of the Risk Profile Questionnaire questions and press Next question.



After answering the final question, press Submit result.

Press ACCEPT Questionnaire Score to choose the Objective and Score associated with the answers selected on the Risk Profile Questionnaire.

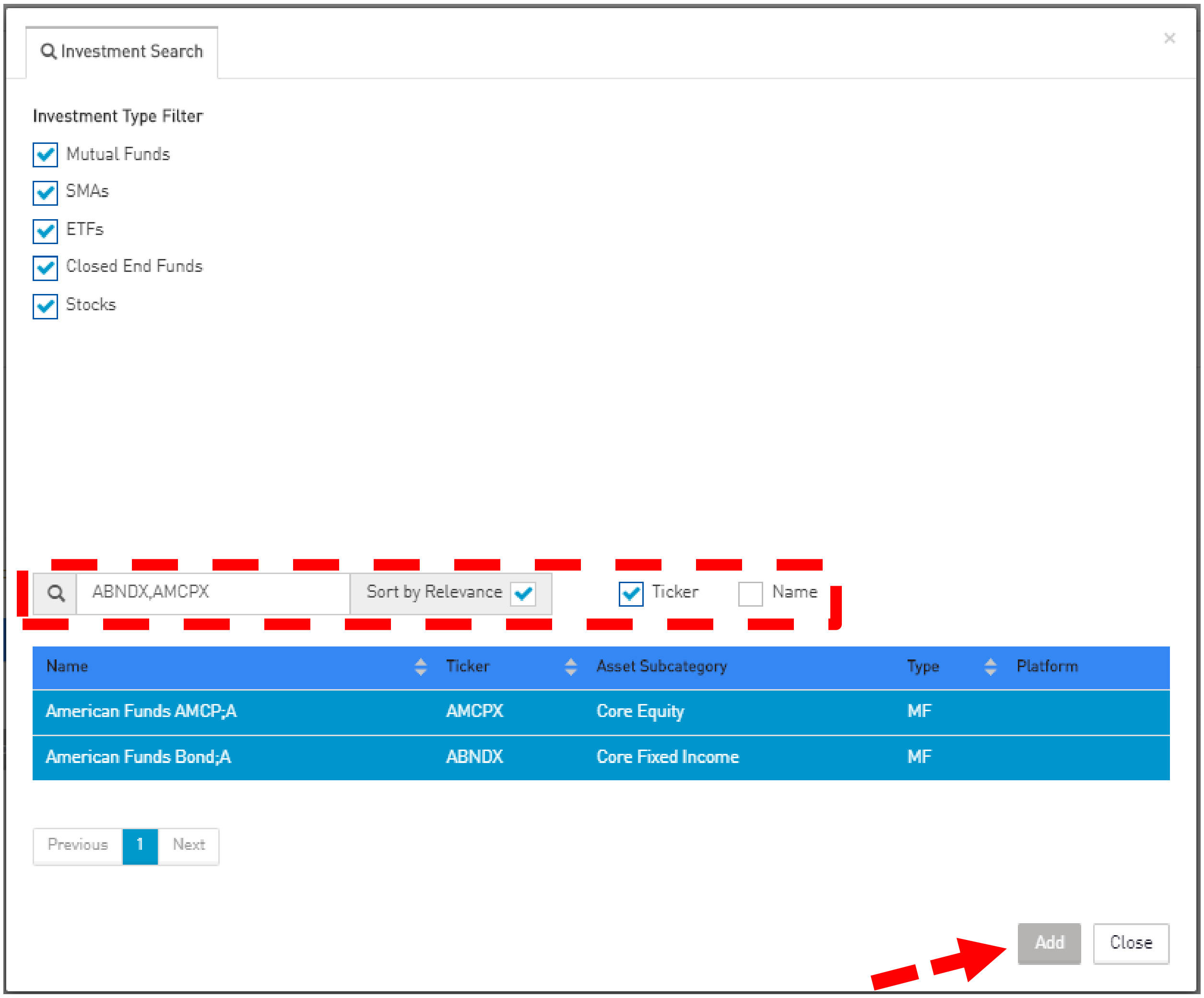


Alternatively slide left and right on the Risk Profile Questionnaire slider to find a level of Risk that your client finds appropriate for the amount of return that the investor is looking to achieve. Press ACCEPT Manual Score.

Users can optionally enter or import existing account information for comparative purposes. To enter an Existing Account, click on Existing Accounts then press the +Analyze Existing Account button.

Choose an Account Owner and Registration Type, optionally enter an Account Name then click Next.

Press Select/Search Asset



Search by ticker and/or name. Multiple tickers can be entered if separated by commas.

Click on one or many Assets to be added then press Add.

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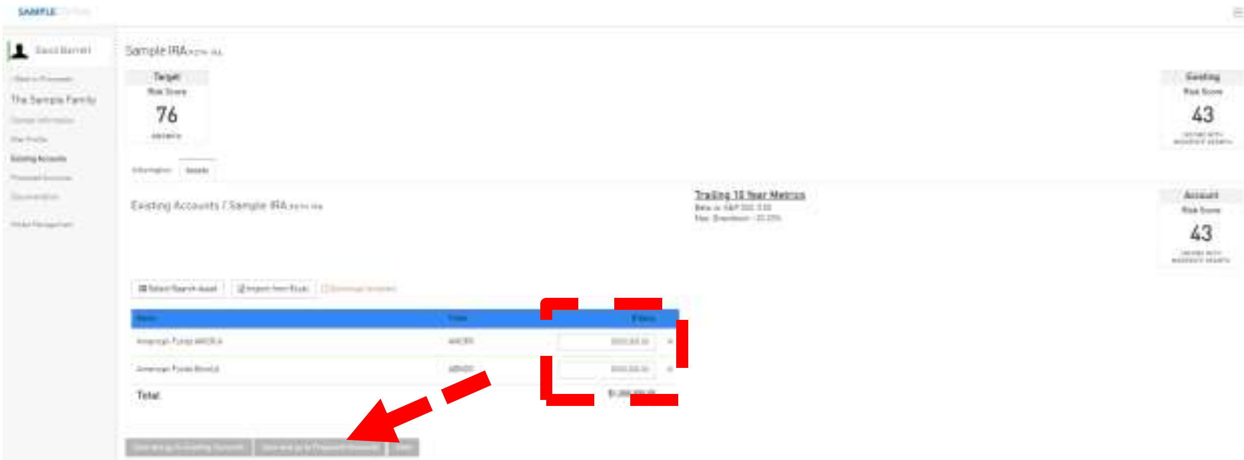

Enter the dollar amount to be associated with each investment. Optionally users can choose to import tickers and values from a CSV file. Once completed press Save and go to Proposed Accounts.

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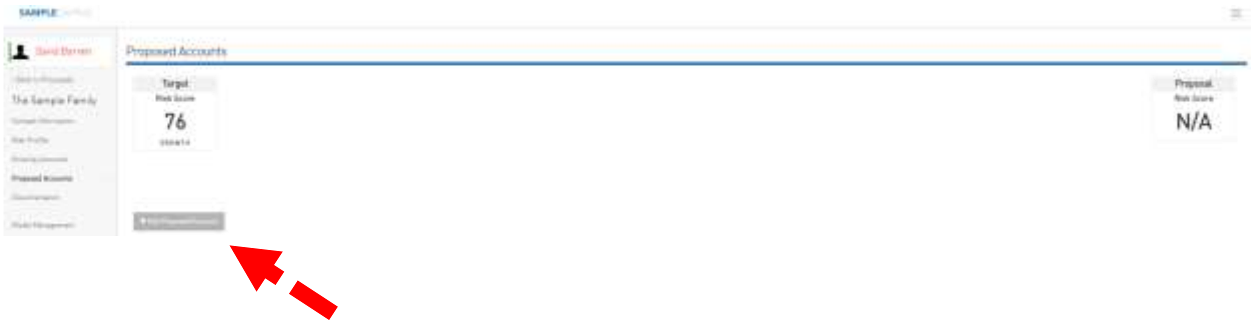

Press Add Proposed Account

Choose an Account Owner and Registration Type then click on the Registration Value icon.

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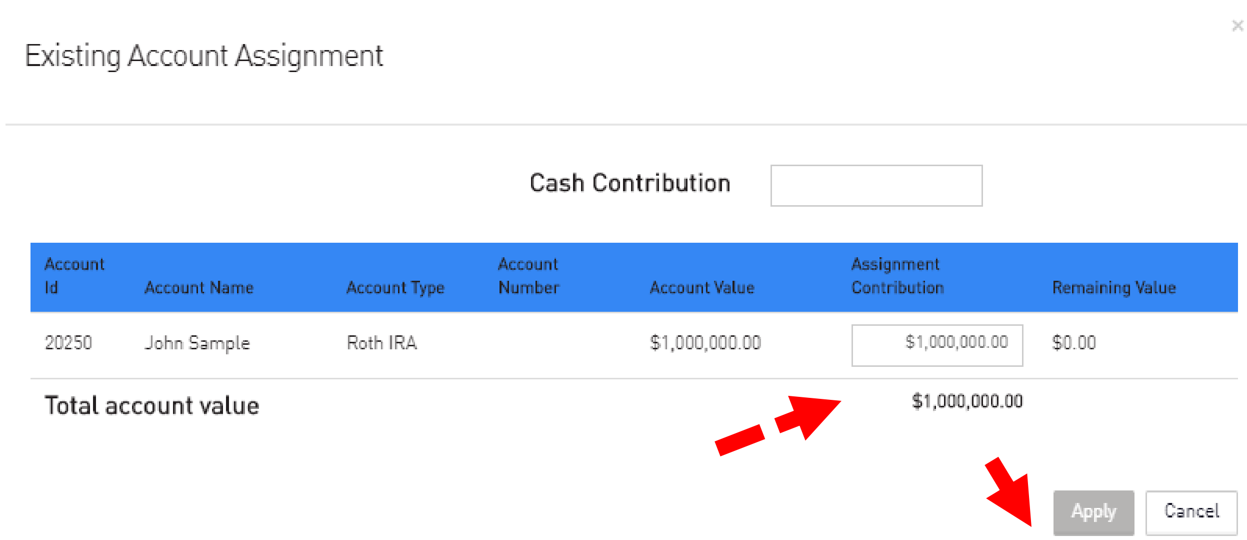
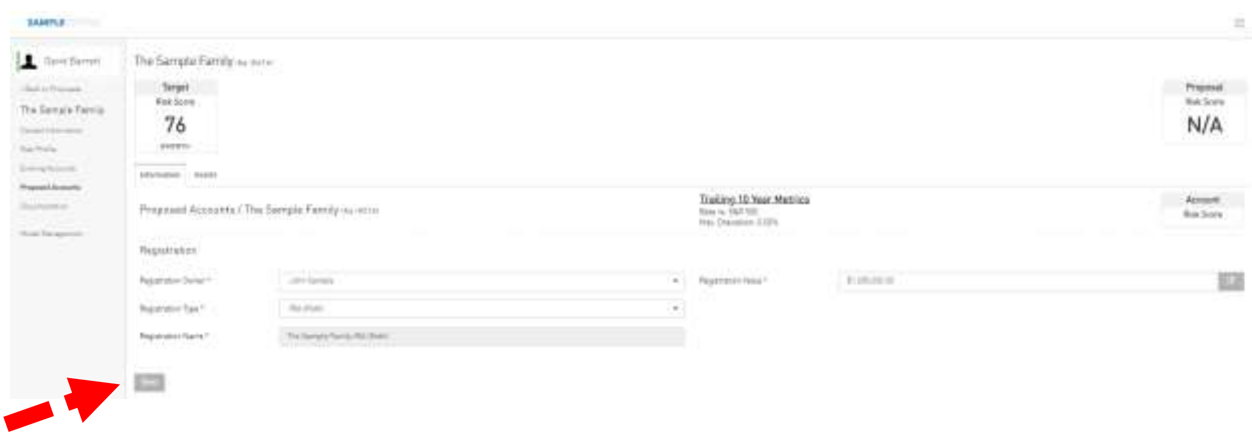


Enter the amount of Cash that is to be used as a source for this Proposed Account and/or Assign the amount of dollars to be sourced from any existing accounts. Press Apply.



Press Next on the Information tab to allocate the Proposed Account Assets.

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Press Load Model to select a pre-defined Model Allocation

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Load Model

Investment Objective Filter

- [x] Income with Capital Preservation
- [x] Income with Moderate Growth
- [x] Growth with Income
- [x] Growth
- [x] Aggressive Growth

Model Owner

- [x] LPL Financial
- [x] David Barrett

Model Name	Model Objective	Risk Score	Date Created	Last updated
	Growth	83	Jun 20, 2017 8:13:15 PM	Oct 2, 2017 1:01:45 PM
	Growth with Income	68	Jun 20, 2017 8:13:15 PM	Oct 2, 2017 1:01:45 PM
	Income with Moderate Growth	50	Jun 20, 2017 8:13:15 PM	Oct 2, 2017 1:01:45 PM
	Income with Capital Preservation	10	Jun 20, 2017 8:13:15 PM	Oct 2, 2017 1:01:45 PM
	Income with Capital Preservation	23	Jun 20, 2017 8:13:15 PM	Oct 2, 2017 1:01:45 PM
	Growth	84	Jun 20, 2017 8:13:15 PM	Oct 2, 2017 1:01:45 PM
	Growth	83	Jun 20, 2017 8:13:15 PM	Oct 2, 2017 1:01:45 PM
	Growth	**76**	**Jun 20, 2017 8:13:15 PM**	**Oct 2, 2017 1:01:45 PM**
	Growth with Income	68	Jun 20, 2017 8:13:15 PM	Oct 2, 2017 1:01:45 PM
	Growth with Income	59	Jun 20, 2017 8:13:15 PM	Oct 2, 2017 1:01:45 PM

Previous 1 2 3 4 5 Next

Load Close

Select a Model then press Load.

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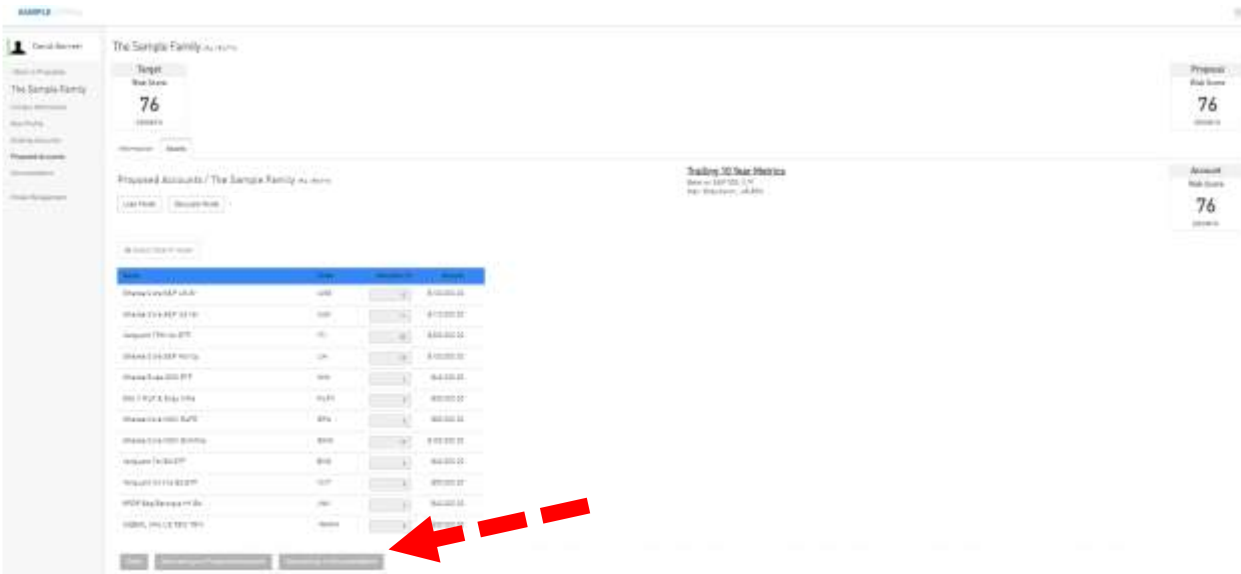
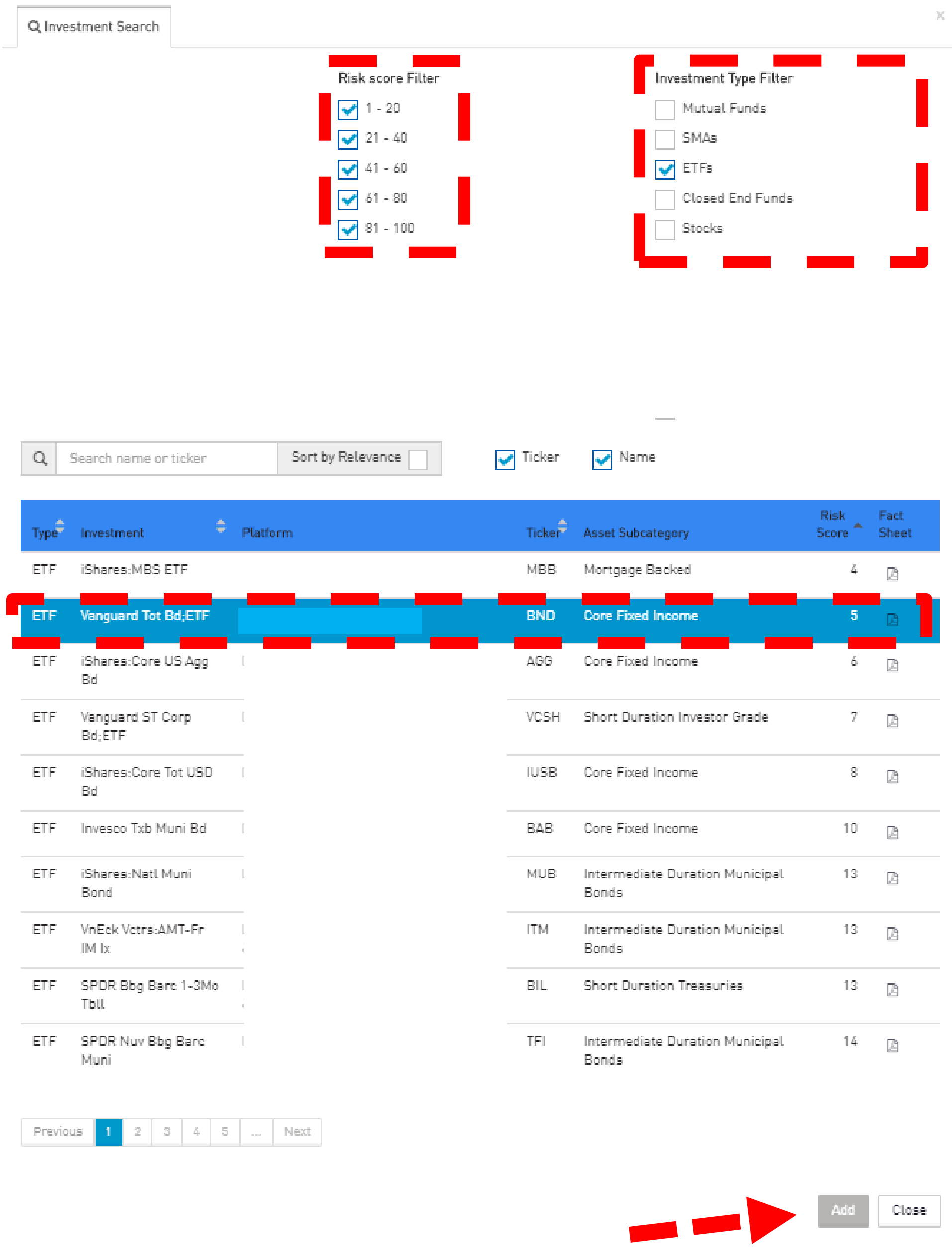


Press Save and go to Documentation

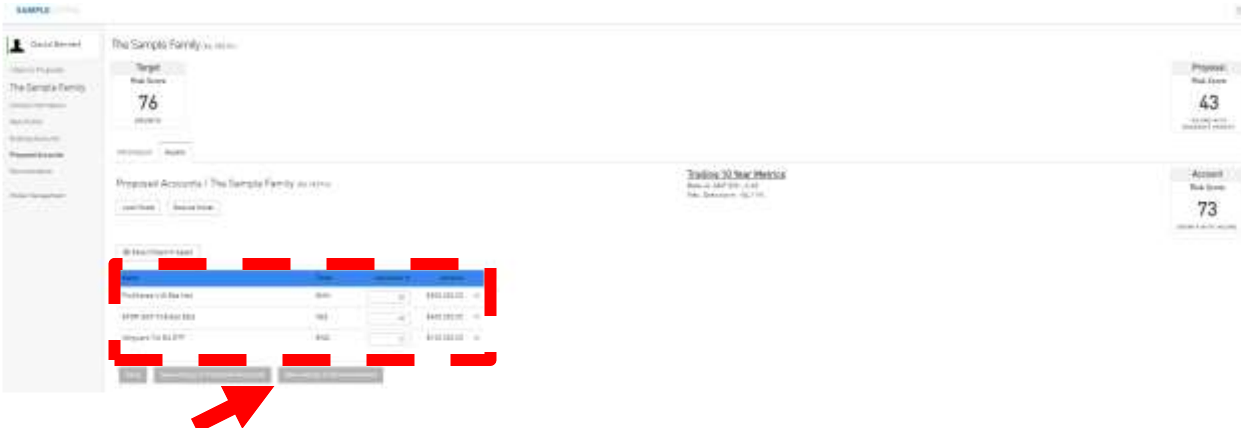
Alternatively, users can create custom asset allocations on-the-fly.

From an empty Proposed Account Assets page, Press Select/Search Asset



Select various criteria to limit the investments which display in the list. Search by ticker and/or name.

Select the Assets to be added then press Add.



Enter the Percentage Allocation to be associated with each investment. Once 100% of the assets have been allocated press Save to save and continue working, Save & go to Proposed Accounts to save and go back to the Proposed Account List or Save and go to Documentation to save and go the Documentation page for generation of output.

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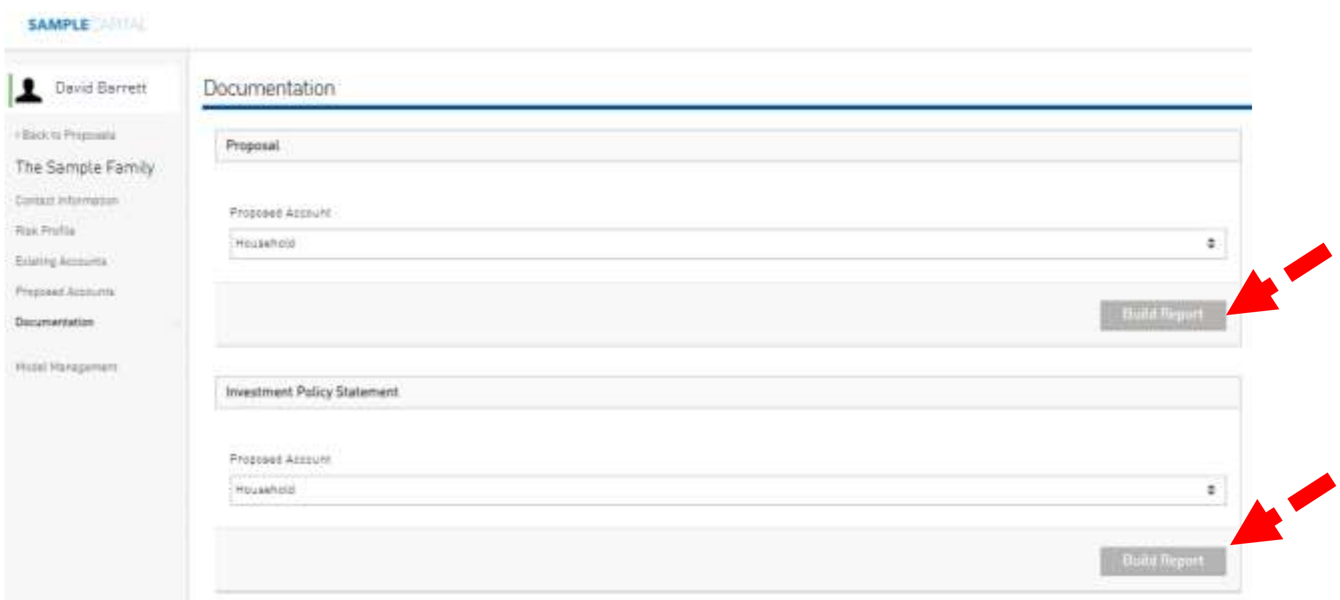

Select whether you'd like to generate a Proposal or Investment Policy Statement at the Household or Individual Proposed Account level then simply press Build Report.

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