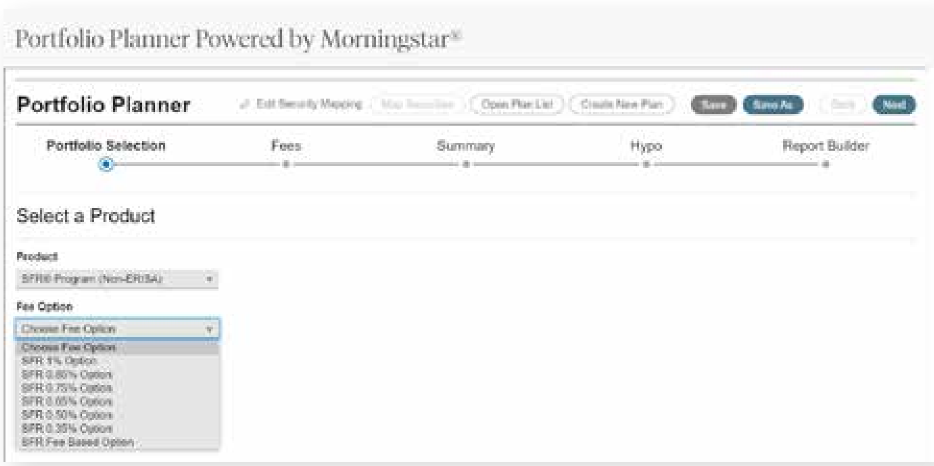
How to Create a New Portfolio: Quick Start Guide

Portfolio Planner Powered by Morningstar®

Step 1: Choose a **Product** from the dropdown.

Step 2: Choose a **Fee Option** from the next dropdown.



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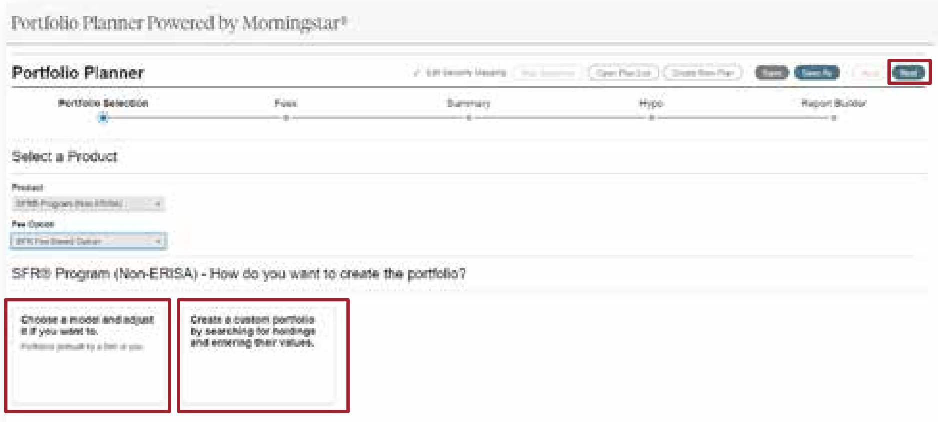
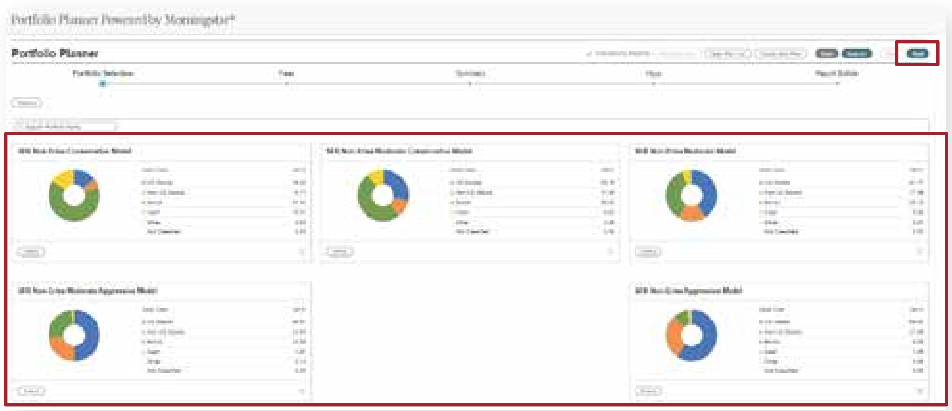
Step 3: Select the **model portfolio** box (select model) or the **custom portfolio** box (select desired investment options, then select **+Add** button), then select the lower **Next** button (top right of screen) and then enter investment percentages (weights) and finally select top-right **Next** button.

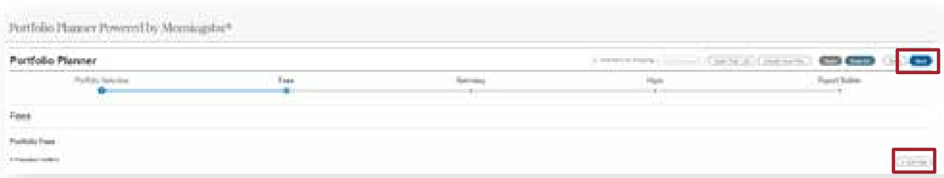


If you choose an existing model (left option), you will see the following screen.

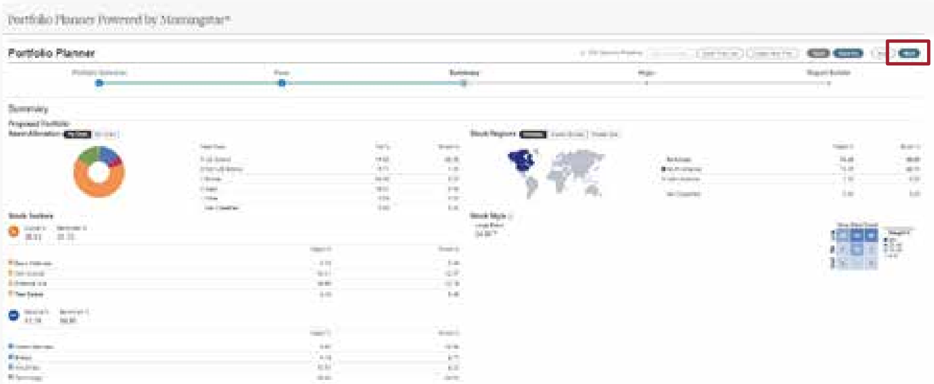


If you choose to create a custom portfolio (right option), you will see the following screen.

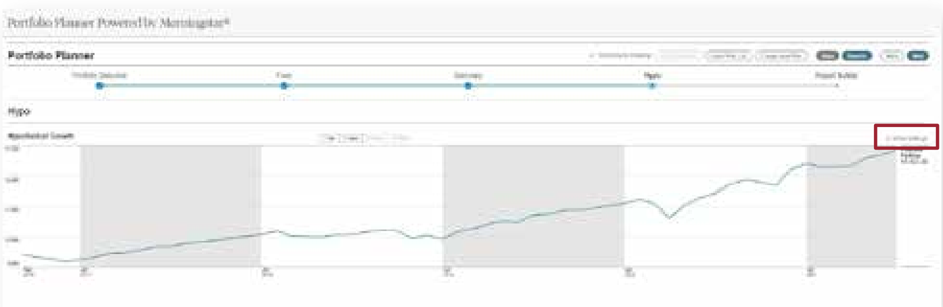
Step 4: To make changes to fees, select the **Edit Fees** button. If you don't need to edit the fees, you can skip this step by selecting the **Next** button (top right of screen).

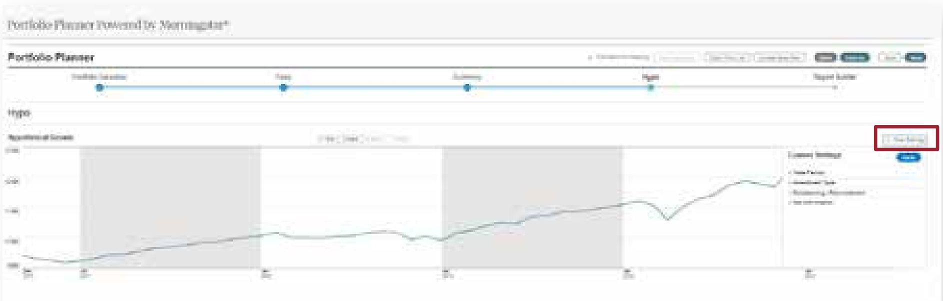


Step 5: Review the charts and analysis. When done, select the **Next** button (top right of screen) until you get to the **Hypo** screen

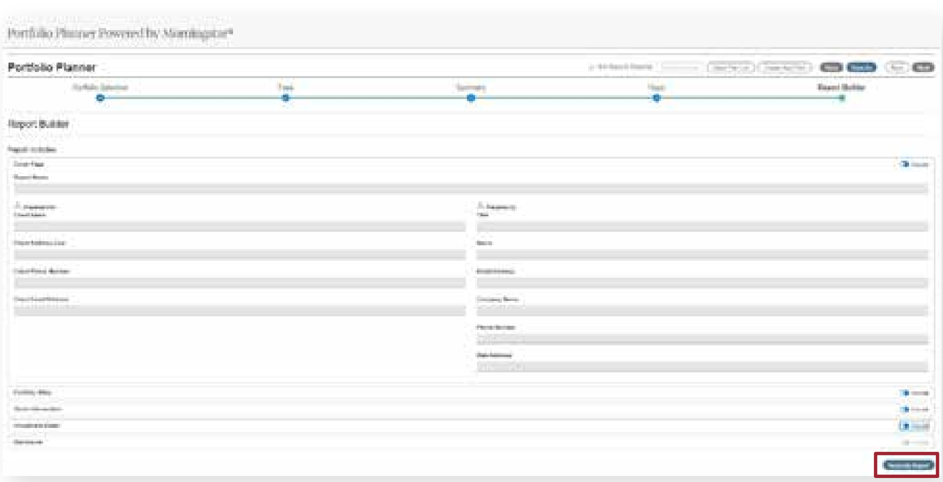


Step 6 (Optional): Select **Show Settings** (top right of hypothetical chart) to make changes to custom settings.





Step 7: Enter the **Report Builder** fields as desired. Select desired reports — then select the **Generate Report** button.



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