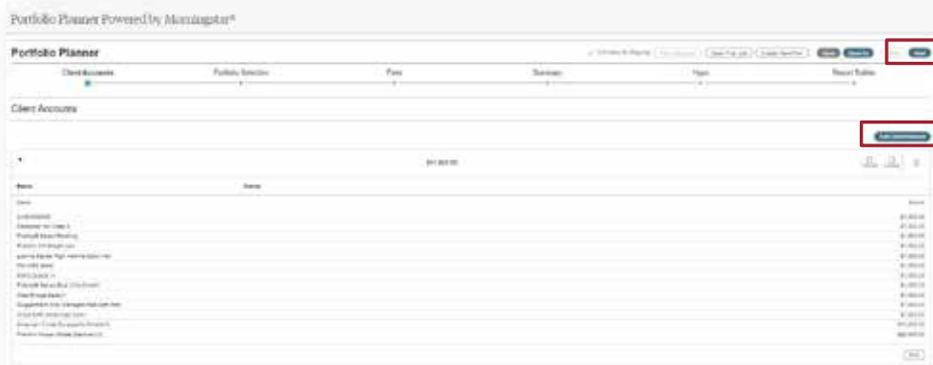




How to Compare an Existing Portfolio: Quick Start Guide

Portfolio Planner Powered by Morningstar®

Step 1: Load existing investments (using the **Import** link [see instructions by clicking ‘i’ icon] found under the **Name** and **Owner** boxes or manually load each investment and \$ amount using the **Search by name, ISIN or ticker** function (lower left). Then select the **Done** button. When finished adding all the existing client investments, select the **Add Client Account** button. Then select the **Next** button.



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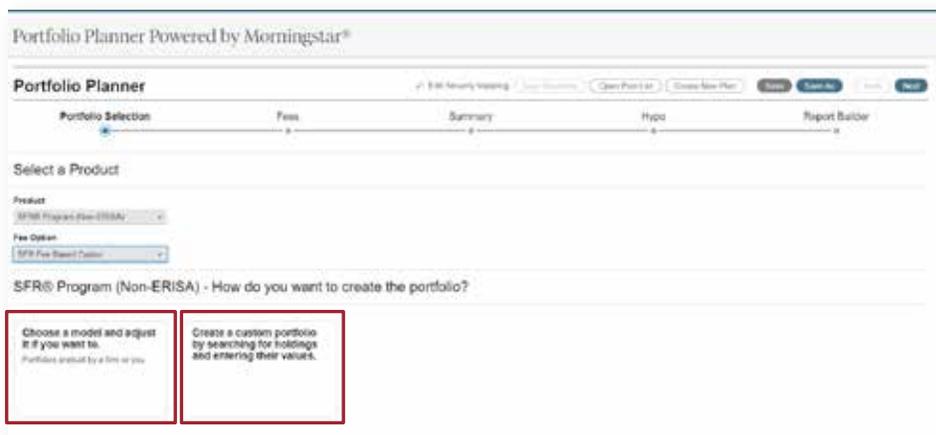
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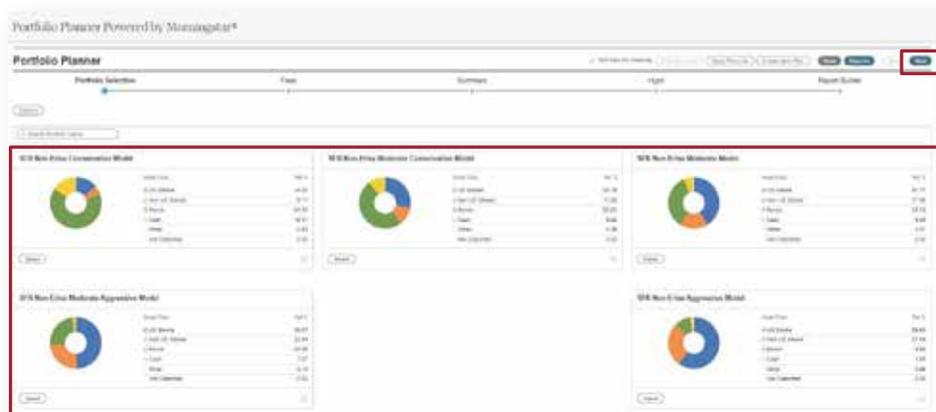
Step 2: Choose a **Product** and **Fee Option** from the dropdown lists (this will be your proposed portfolio for comparison)



Step 3: Select the **model portfolio** box (select model) or the **custom portfolio** box (select desired investments, 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.



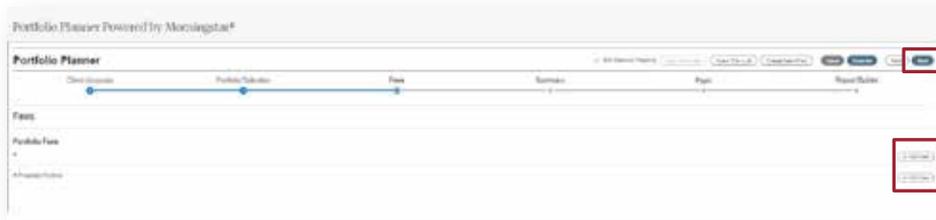
If you choose an existing model (left option), you will see the following screen.



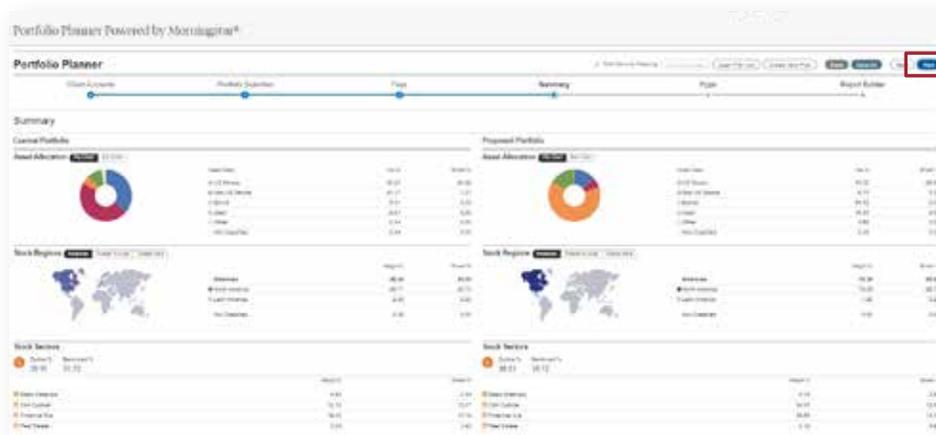
If you choose to create a custom portfolio (right option), you will see the following screen.



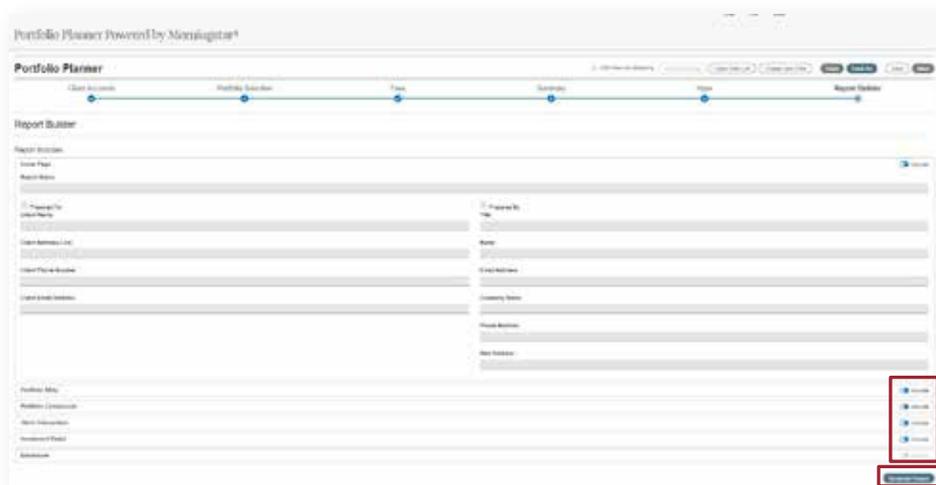
Step 4: You can then add any fees and select the **Next** button (top right of screen).



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



Step 6: Enter the **Report Builder** fields as desired. Select desired reports — then select the **Generate Report** button. You will then see comparison reports for both the **Current Portfolio** and the **Proposed Portfolio**.



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