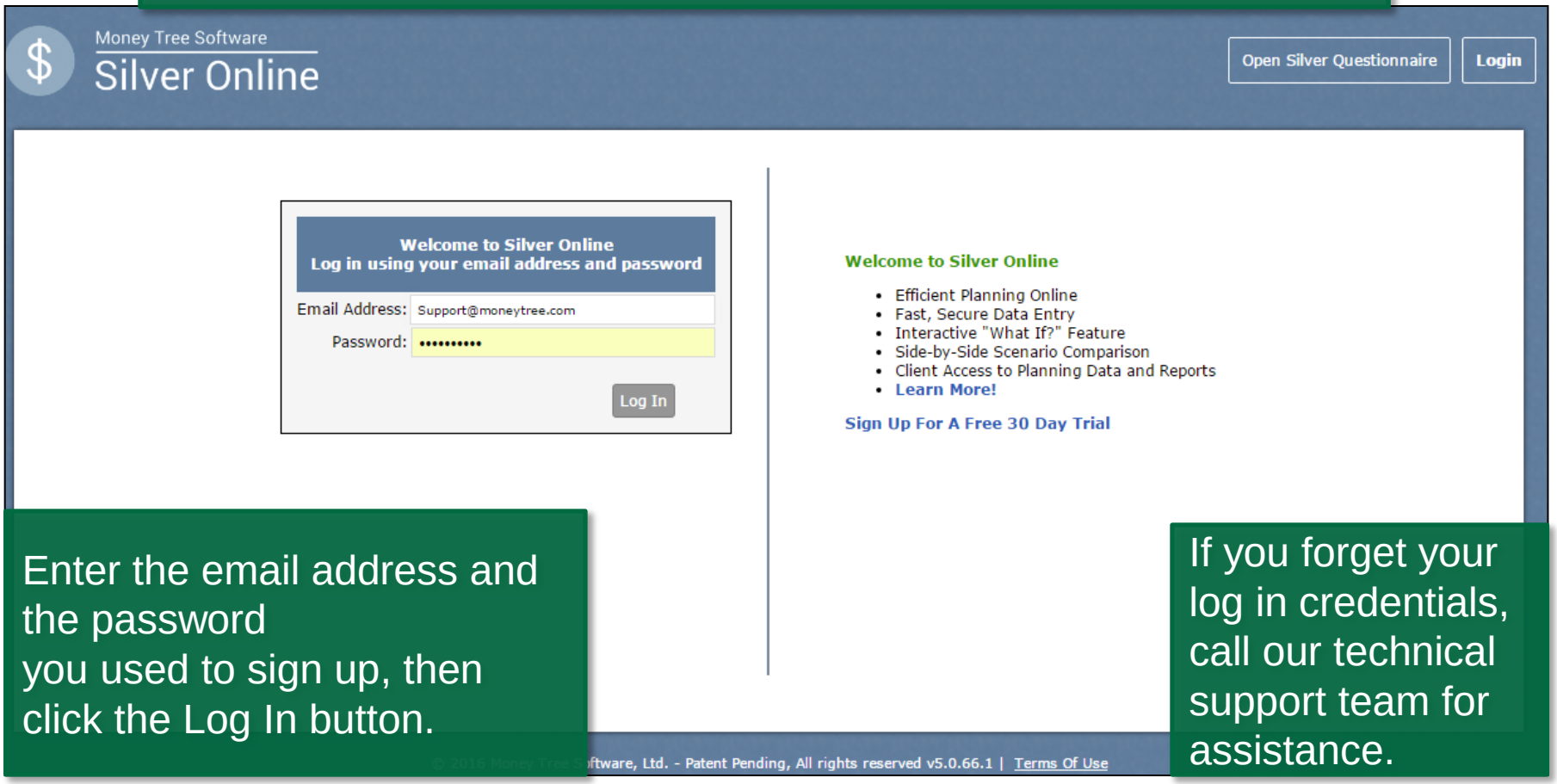
Silver Online User Guide

Setup, Settings, and Administration

Table of Contents

Logging In to Silver Online

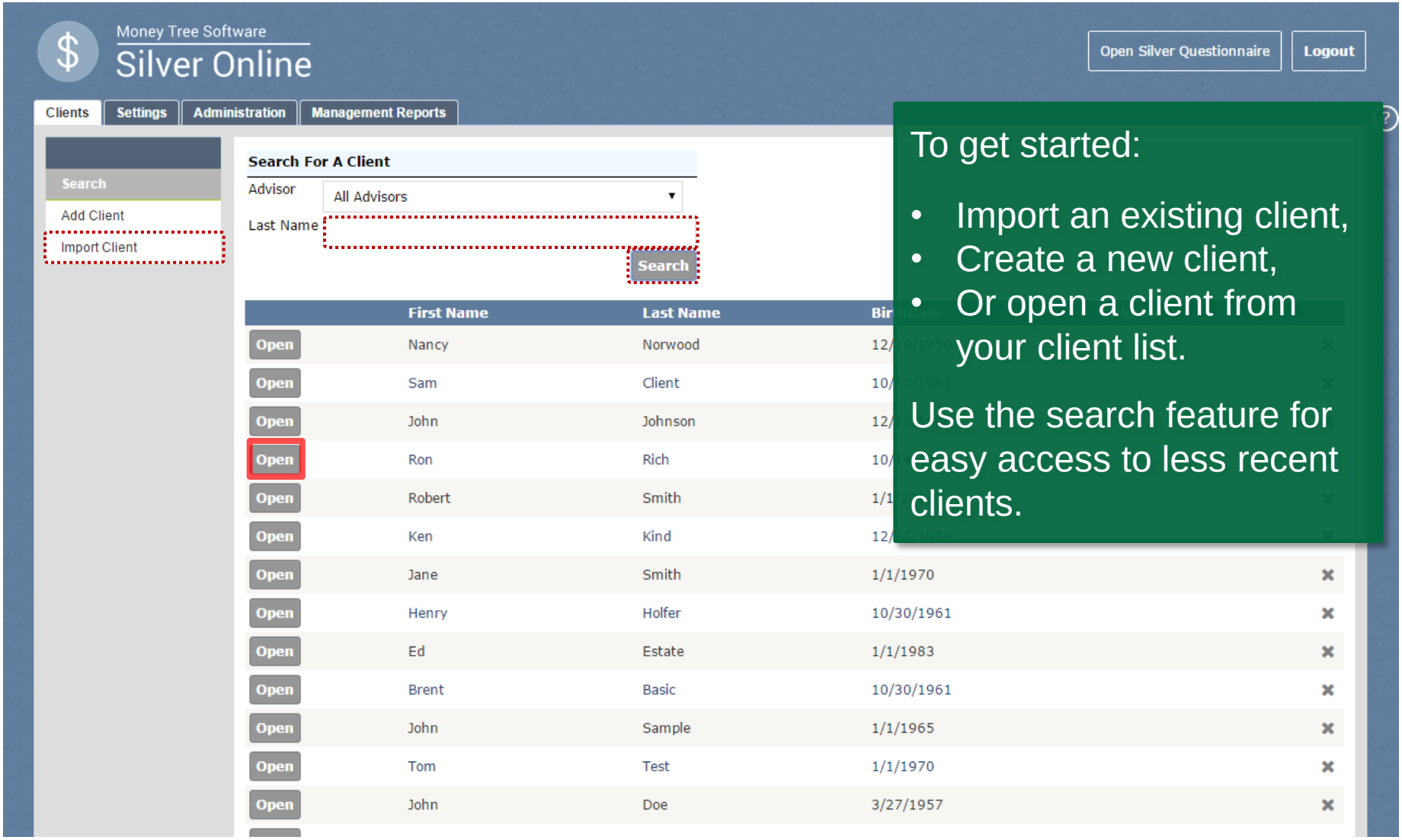
To log in to Silver Online, you can either start at our company website moneytree.com and select the Log In button in the top right corner, or you can go straight to silveronline.moneytree.com



Enter the email address and the password
you used to sign up, then click the Log In button.

If you forget your log in credentials, call our technical support team for assistance.

Getting Started – Create or Open a Client

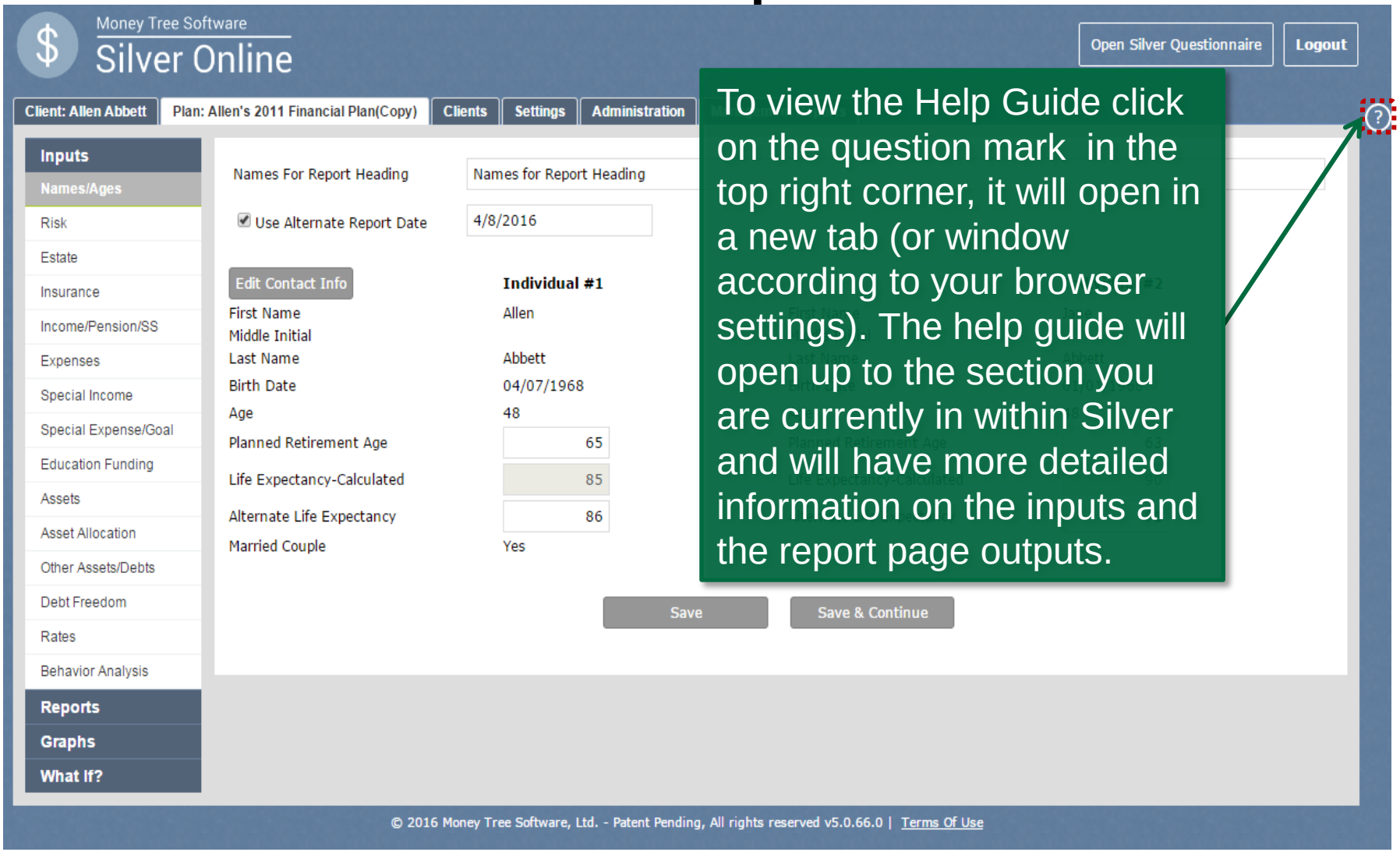


To get started:

- Import an existing client,
- Create a new client,
- Or open a client from your client list.

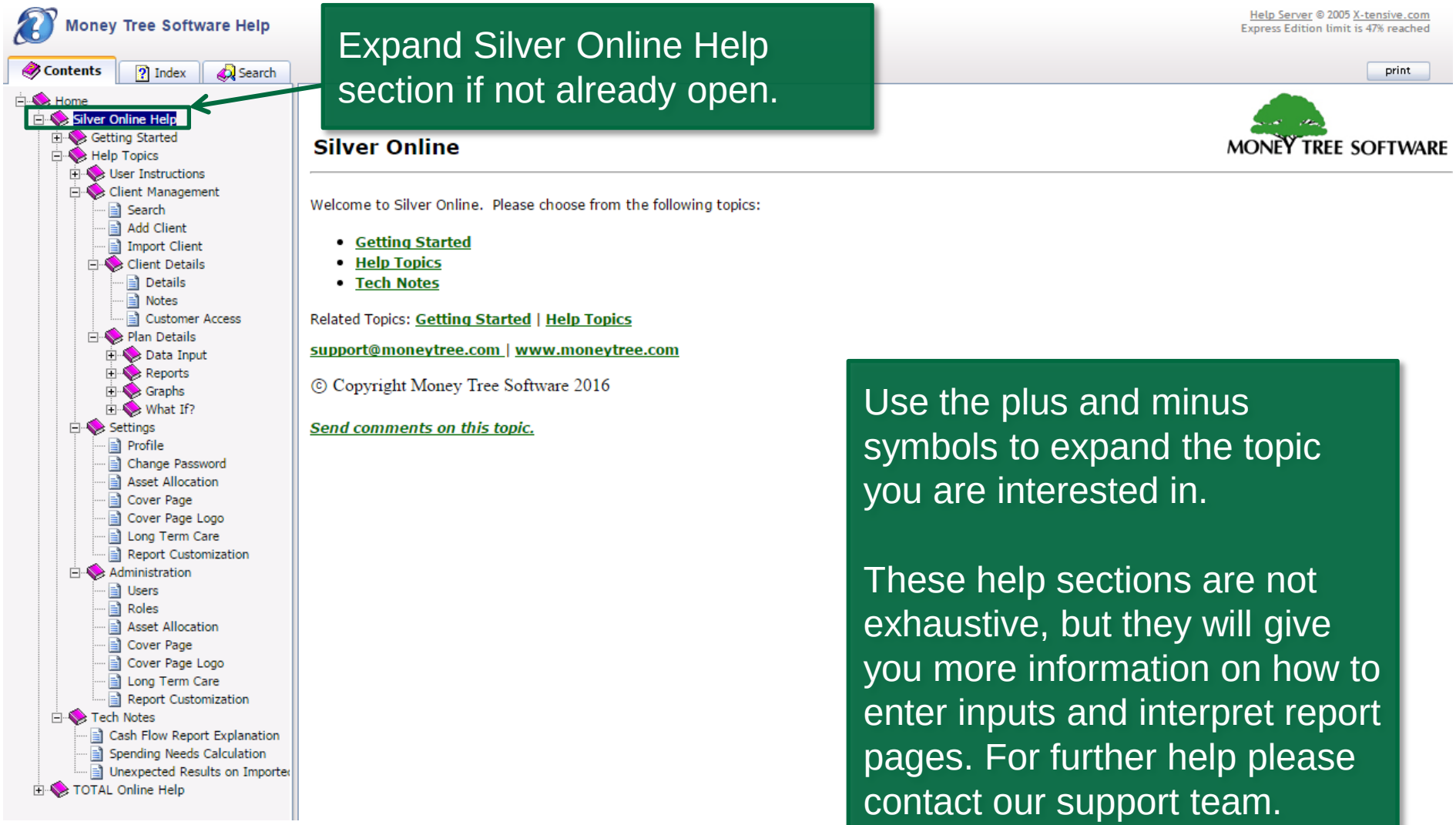
Use the search feature for easy access to less recent clients.

Online Help Guide



To view the Help Guide click on the question mark in the top right corner, it will open in a new tab (or window according to your browser settings). The help guide will open up to the section you are currently in within Silver and will have more detailed information on the inputs and the report page outputs.

Help Guide Navigation



Expand Silver Online Help section if not already open.

Use the plus and minus symbols to expand the topic you are interested in.

These help sections are not exhaustive, but they will give you more information on how to enter inputs and interpret report pages. For further help please contact our support team.

Silver Questionnaire

Money Tree Software
Silver Online

Open Silver Questionnaire | Logout

Client: Allen Abbett | Plan: Allen's 2011 Financial Plan(Copy) | Clients | Settings | Administration | Management Reports

Inputs
Names/Ages
Risk
Estate
Insurance
Income/Pension/SS
Expenses
Special Income

Names For Report Heading: Names for Report Heading
Use Alternate Report Date: 4/8/2016

Edit Contact Info

	Individual #1	Individual #2
First Name	Allen	Jane
Middle Initial		
Last Name	Abbett	Abbett
Birth Date	04/07/1968	01/01/1968
Age	48	48
Planned Retirement Age		63
Life Expectancy-Calculated		90
Alternate Life Expectancy		91

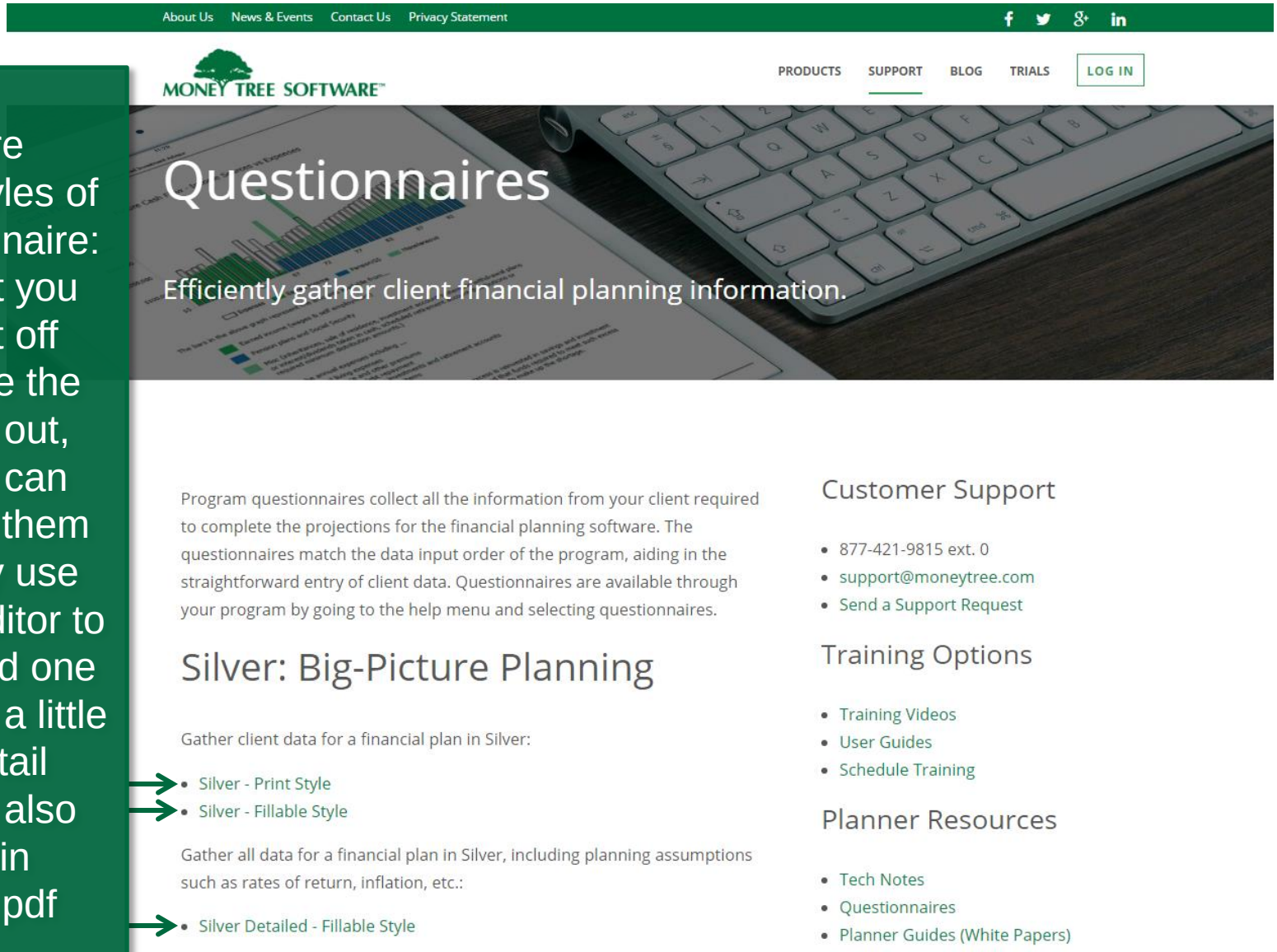
Save | Save & Continue

Use the questionnaire to gather the relevant information from your clients for the plan in an easy to use format.

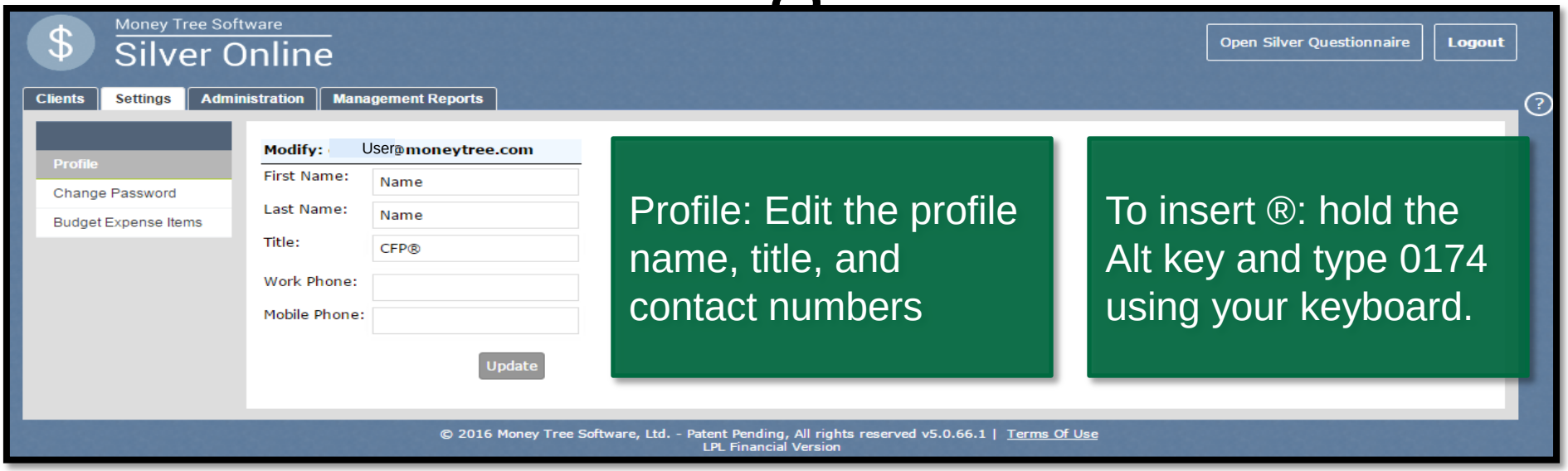
If you are interested in a version of the questionnaire that the client fills out, and you simply import into the program instead of manually entering the information, please contact us and ask about our Secure Online Planning Survey (SOPS)

Silver Questionnaire

There are three styles of questionnaire: One that you can print off and have the client fill out, one you can email to them and they use a .pdf editor to fill in, and one that has a little more detail and can also be filled in using a .pdf editor.

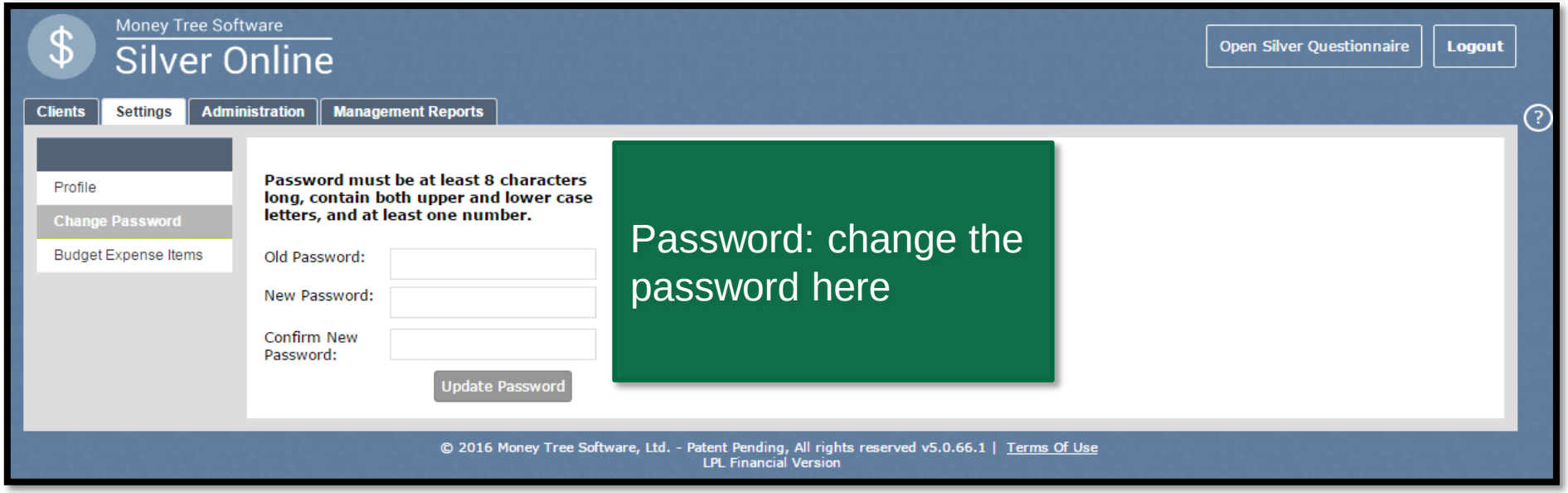


Settings Tab



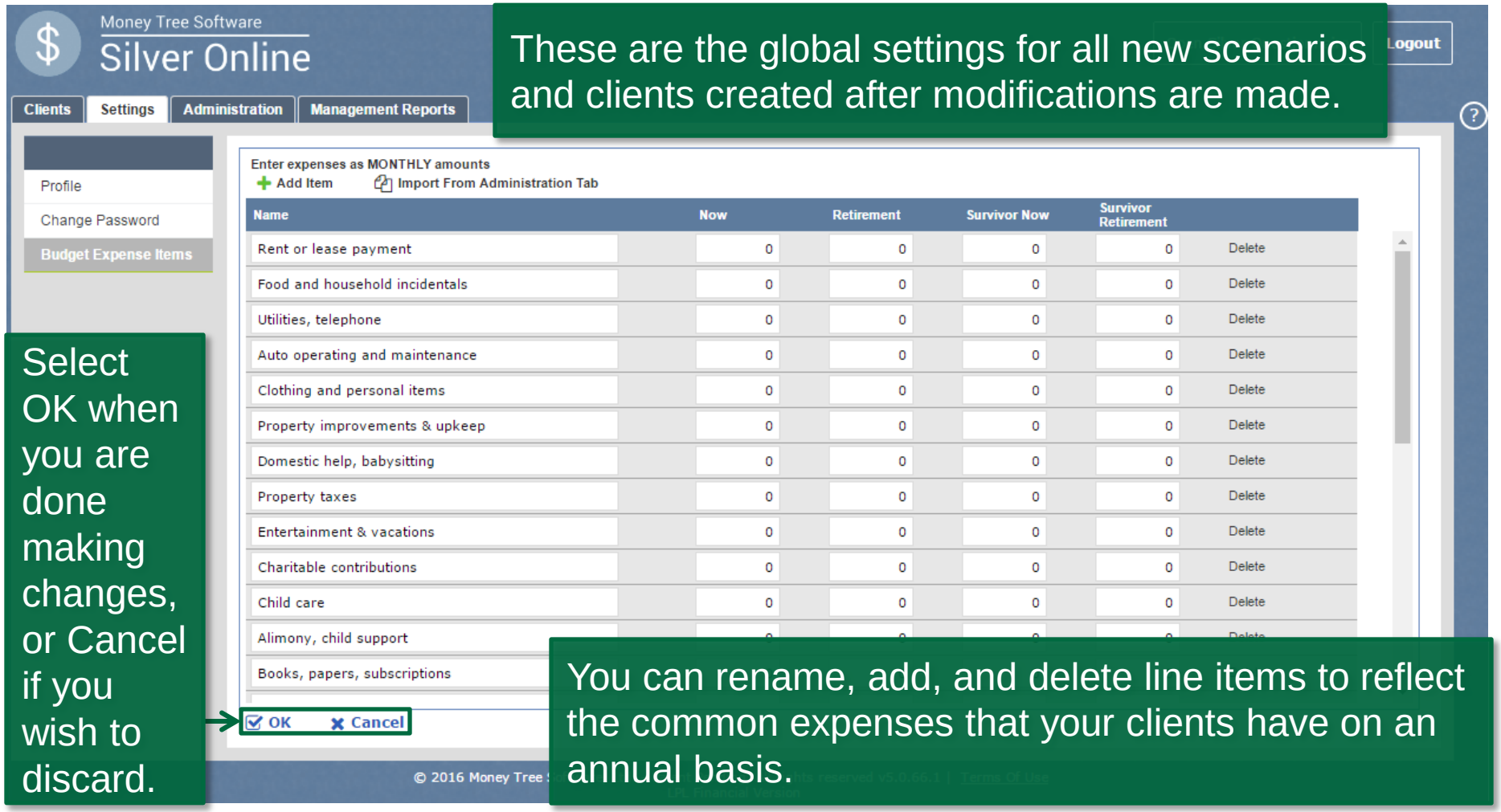
Profile: Edit the profile name, title, and contact numbers

To insert ®: hold the Alt key and type 0174 using your keyboard.



Password: change the password here

Settings Tab

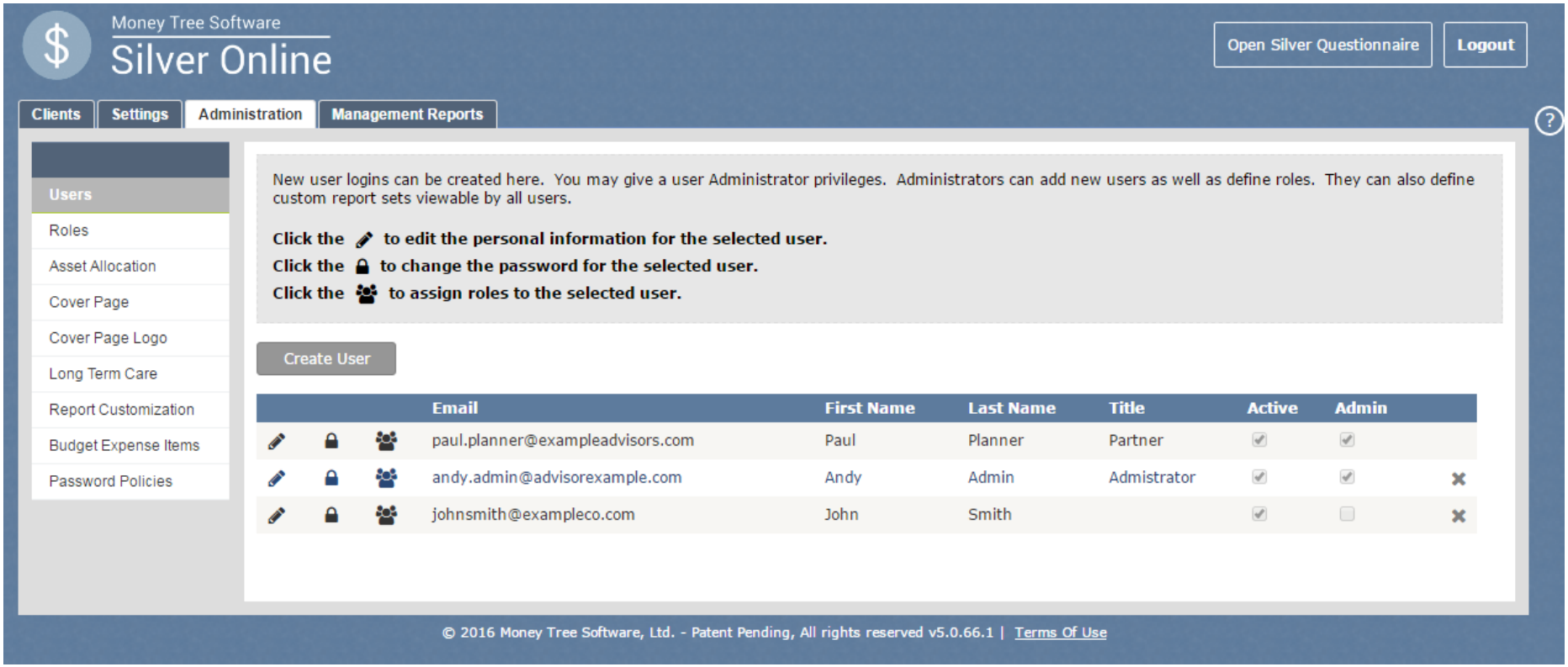


These are the global settings for all new scenarios and clients created after modifications are made.

Select OK when you are done making changes, or Cancel if you wish to discard.

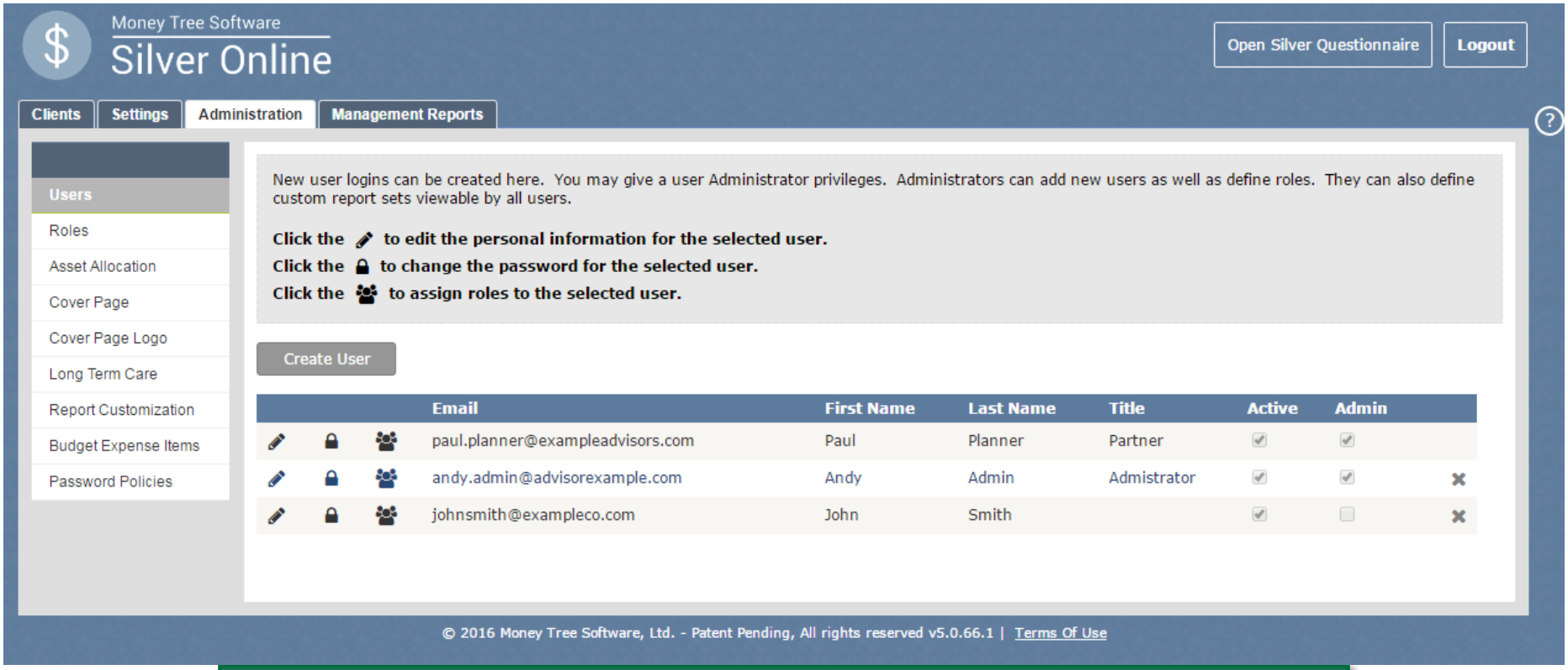
You can rename, add, and delete line items to reflect the common expenses that your clients have on an annual basis.

Administration Tab



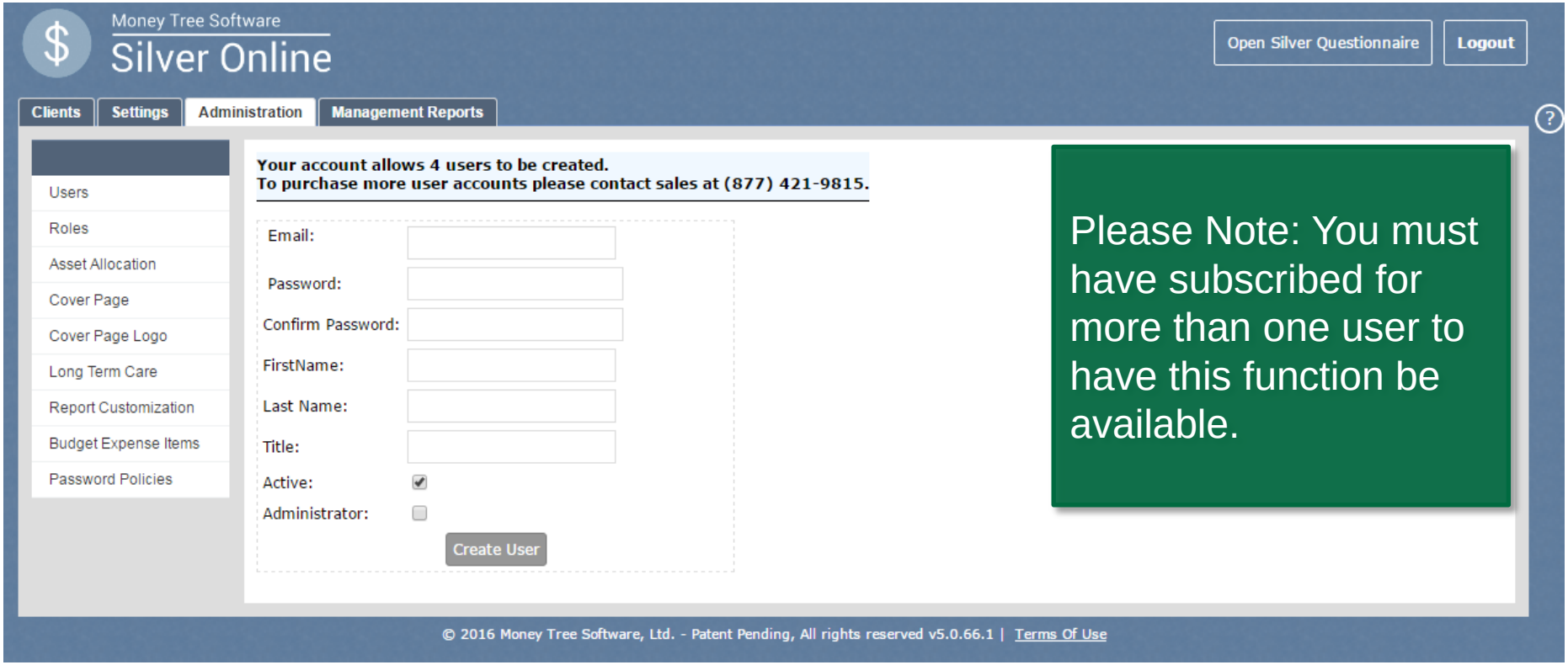
If you are an administrator on the account, the Administration tab will allow you to make changes to the roles and permissions for users, along with the defaults and settings for the account.

Administration Tab



To edit a user's information, select the pencil icon next to their name. To change the password for a user, select the lock symbol next to their email. The icon that looks like a person is the Role icon, use this to set what each user is allowed to edit or print. If you need to set up a user, select the Create User button.

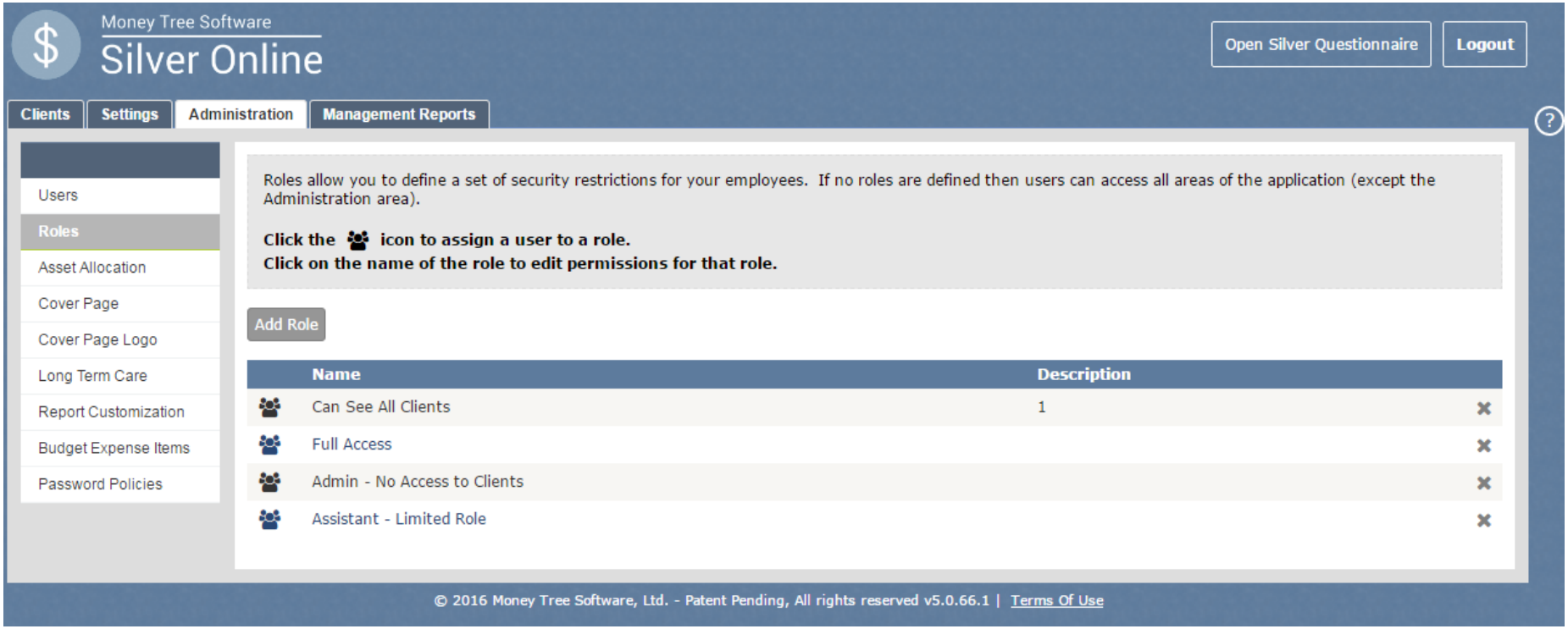
Administration: Create New User



Please Note: You must have subscribed for more than one user to have this function be available.

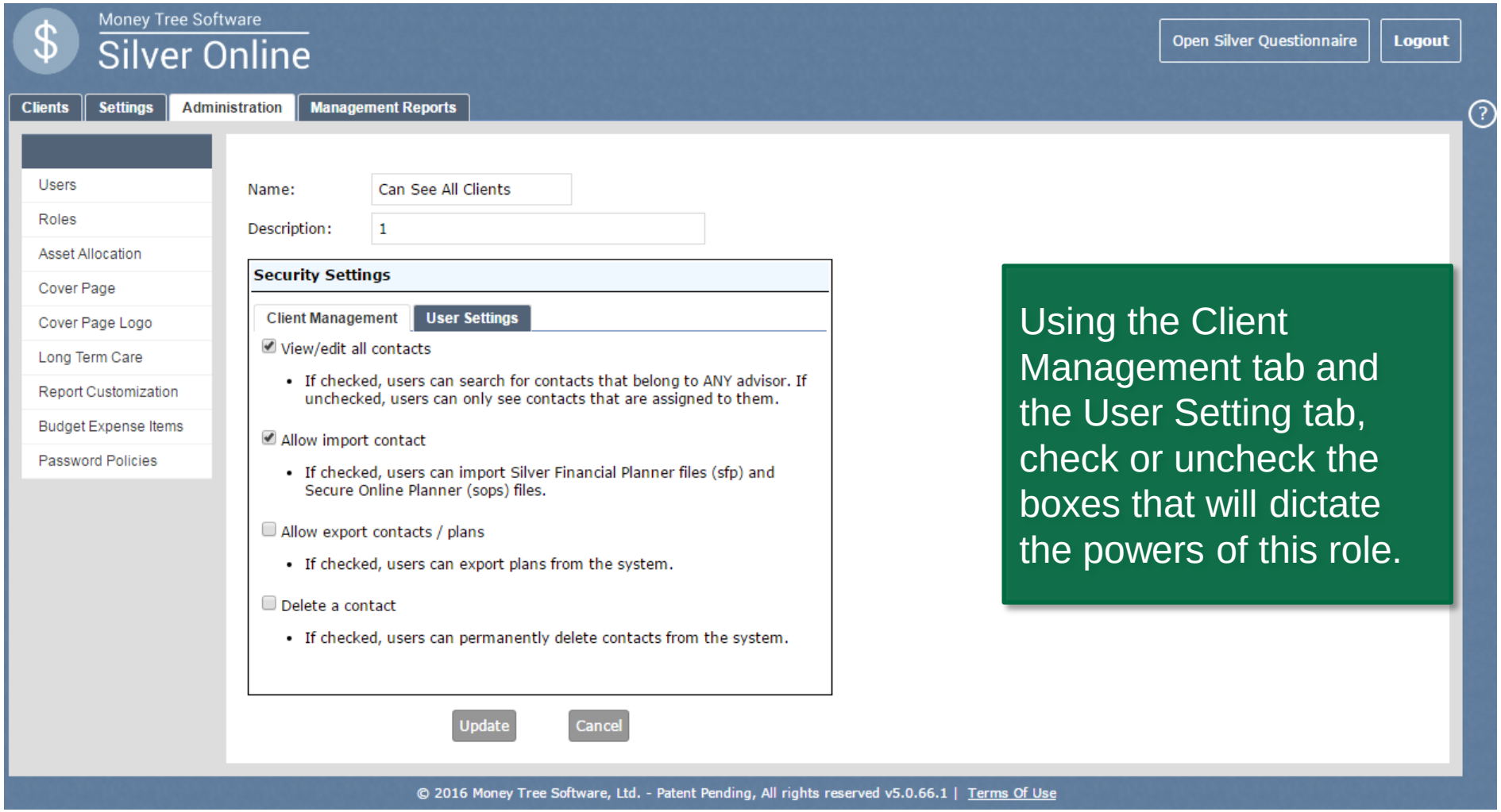
Enter the information that will be associated with this user. Be mindful that if you give administrative powers to a user they will have the same abilities that you have as the account administrator. When finished, select Create User.

Administration: Roles



You can create and assign roles here, roles dictate the permissions that different user types can wield. To create a role, select the Add Role button. To assign a role to a particular user, select the role from the list and follow the instructions on the next slide.

Administration: Roles



Using the Client Management tab and the User Setting tab, check or uncheck the boxes that will dictate the powers of this role.

Asset Allocation

Money Tree Software
Silver Online

Open Silver Questionnaire | Logout

Clients | Settings | Administration | Management Reports

- Users
- Roles
- **Asset Allocation**
- Cover Page
- Cover Page Logo
- Long Term Care
- Report Customization
- Budget Expense Items
- Password Policies

		Accumulation Portfolios					Retirement Portfolios					Later Life Portfolios				
Class Name	**Abbrv.**	**1**	**2**	**3**	**4**	**5**	**1**	**2**	**3**	**4**	**5**	**1**	**2**	**3**	**4**	**5**
Cash & Reserves	Cash	20	20	15	5	5	25	20	15	10	5	30	25	25	20	15
Income	Income	35	25	10	0	0	30	25	20	10	10	50	40	30	25	20
Income & Growth	Inc./Gro.	45	30	20	15	0	35	25	20	20	15	20	25	30	30	25
Growth	Growth	0	25	30	40	35	10	25	30	35	30	0	5	10	15	25
Aggressive Growth	Agg. Gro.	0	0	25	40	60	0	5	15	25	40	0	5	5	10	15
Other	Other	0	0	0	0	0	0									
		0	0	0	0	0	0									
		0	0	0	0	0	0									
		0	0	0	0	0	0									
		0	0	0	0	0	0									
		0	0	0	0	0	0									
		0	0	0	0	0	0									
Total Percentage		**100**	**100**	**100**	**100**	**100**	**100**	**10**								

Update

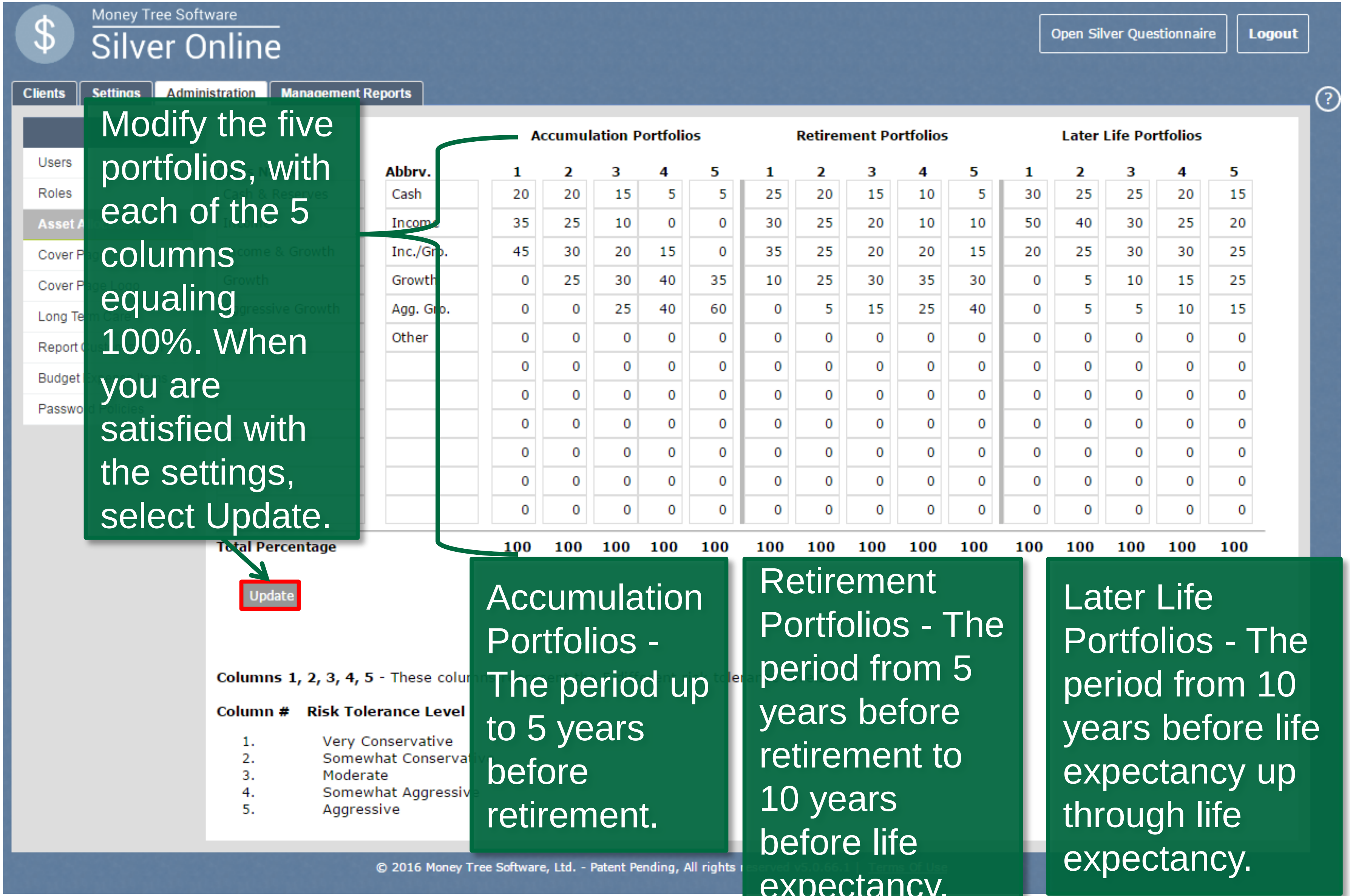
You may change the class names to match the classes of assets that your company handles most often. These are the global settings for all clients.

Columns 1, 2, 3, 4, 5 - These columns represent the 5 different risk tolerance levels.

Column #	**Risk Tolerance Level**
1.	Very Conservative
2.	Somewhat Conservative
3.	Moderate
4.	Somewhat Aggressive
5.	Aggressive

The columns within each portfolio match up to the risk tolerance groups.

Asset Allocation



Abbrv.	Accumulation Portfolios 1	2	3	4	5	Retirement Portfolios 1	2	3	4	5	Later Life Portfolios 1	2	3	4	5
Cash	20	20	15	5	5	25	20	15	10	5	30	25	25	20	15
Income	35	25	10	0	0	30	25	20	10	10	50	40	30	25	20
Inc./Gro.	45	30	20	15	0	35	25	20	20	15	20	25	30	30	25
Growth	0	25	30	40	35	10	25	30	35	30	0	5	10	15	25
Agg. Gro.	0	0	25	40	60	0	5	15	25	40	0	5	5	10	15
Other	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total Percentage	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100

Columns 1, 2, 3, 4, 5 - These colu

Column #	**Risk Tolerance Level**
1.	Very Conservative
2.	Somewhat Conservat
3.	Moderate
4.	Somewhat Aggressiv
5.	Aggressive

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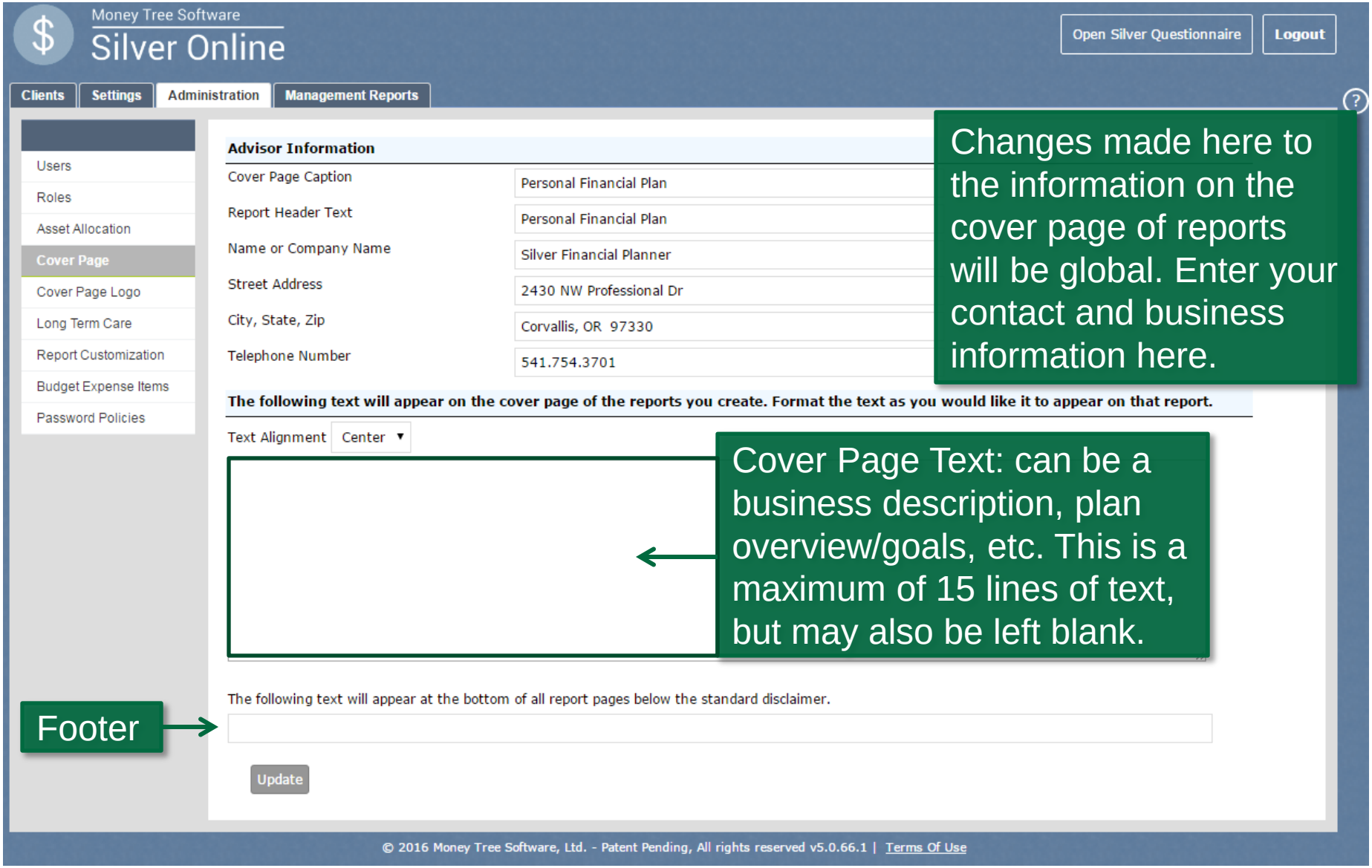
Modify the five portfolios, with each of the 5 columns equaling 100%. When you are satisfied with the settings, select Update.

Accumulation Portfolios - The period up to 5 years before retirement.

Retirement Portfolios - The period from 5 years before retirement to 10 years before life expectancy.

Later Life Portfolios - The period from 10 years before life expectancy up through life expectancy.

Administration: Cover Page



Changes made here to the information on the cover page of reports will be global. Enter your contact and business information here.

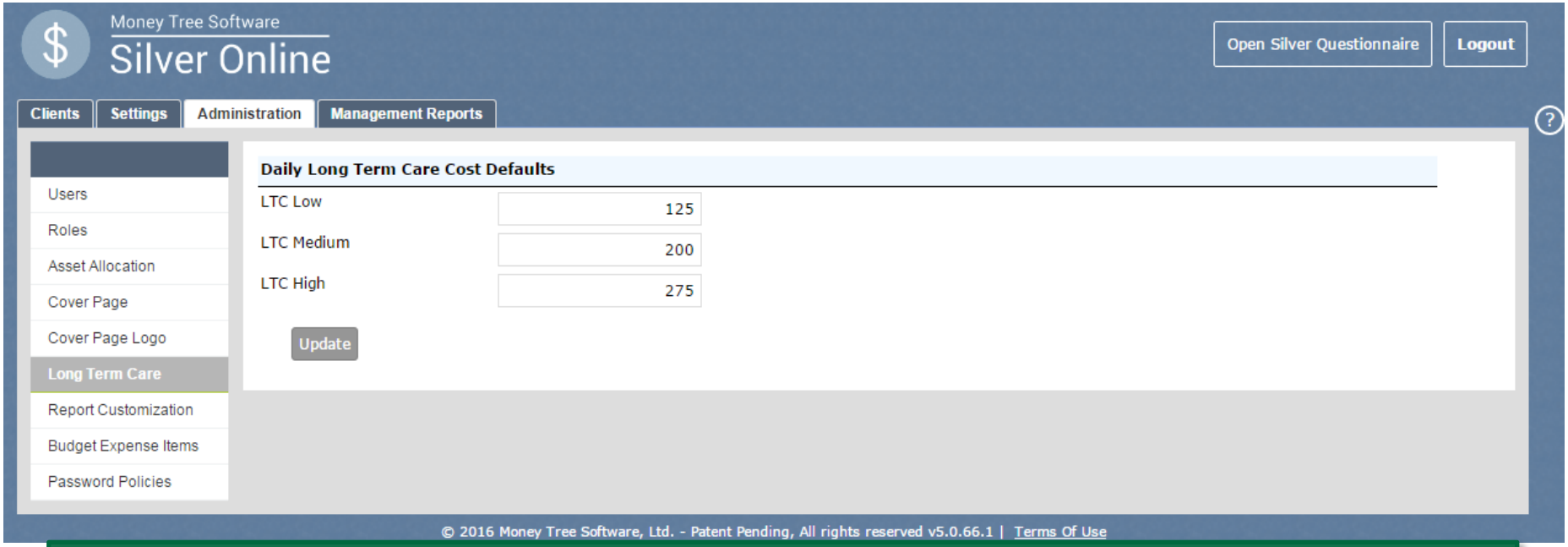
Cover Page Text: can be a business description, plan overview/goals, etc. This is a maximum of 15 lines of text, but may also be left blank.

Footer

Administration: Cover Page Logo

You can upload your company logo to appear on the cover page. Use either a .png or .jpg image, measuring 200x000 pixels approximately.

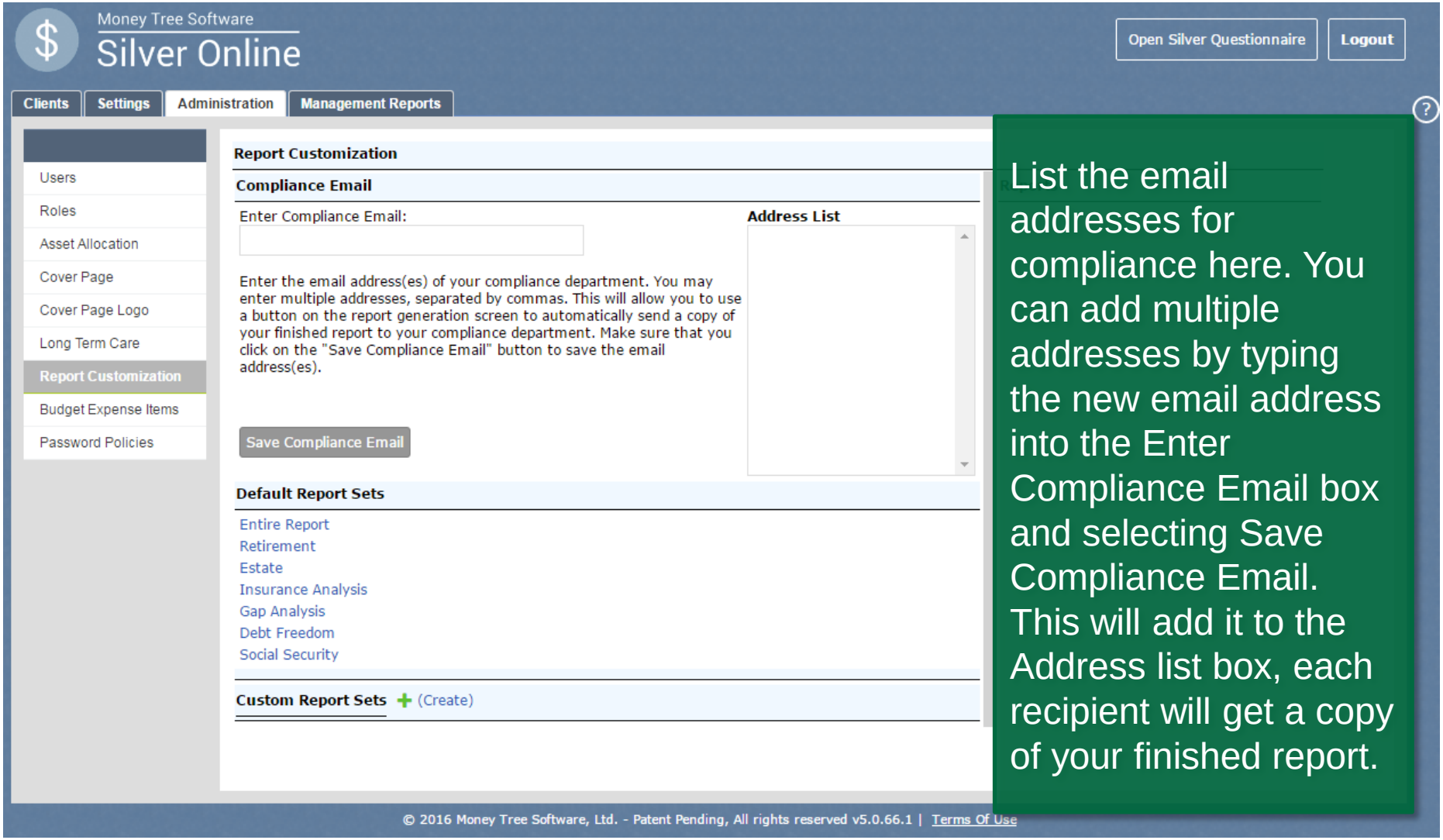
Administration: Long Term Care



These will be the default settings used if you do not enter exact amounts for your client's Long Term Care costs in their plan.

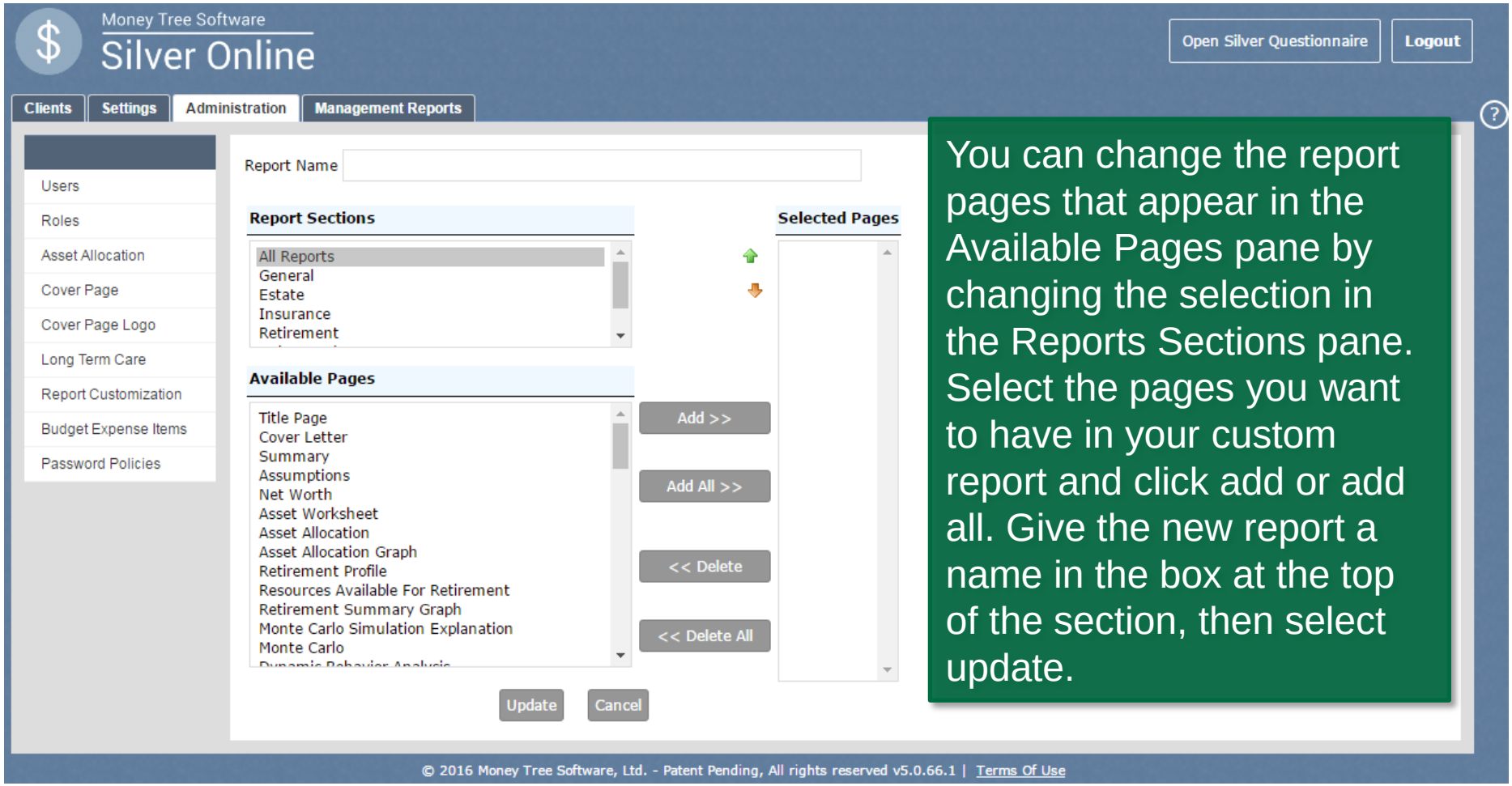
- Low represents $50,000 or less of the *Annual Expenses During Retirement* from the Expenses input screen.
- Medium will be $50,000 to $100,000 of the *Annual Expenses During Retirement* from the Expenses input screen.
- High represents more than $100,000 of the *Annual Expenses During Retirement* from the Expenses input screen.

Administration: Report Customization



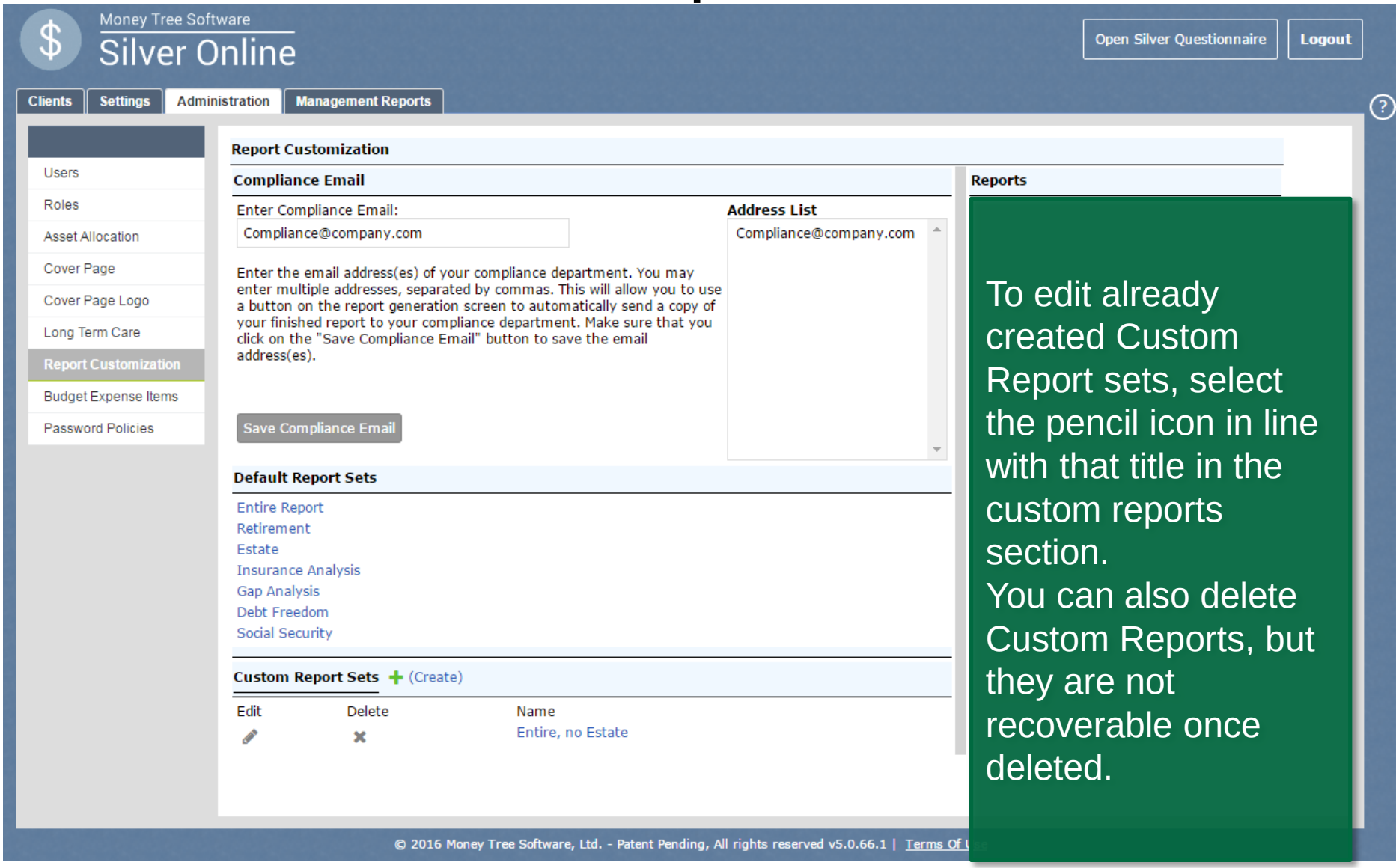
List the email addresses for compliance here. You can add multiple addresses by typing the new email address into the Enter Compliance Email box and selecting Save Compliance Email. This will add it to the Address list box, each recipient will get a copy of your finished report.

Administration: Report Customization



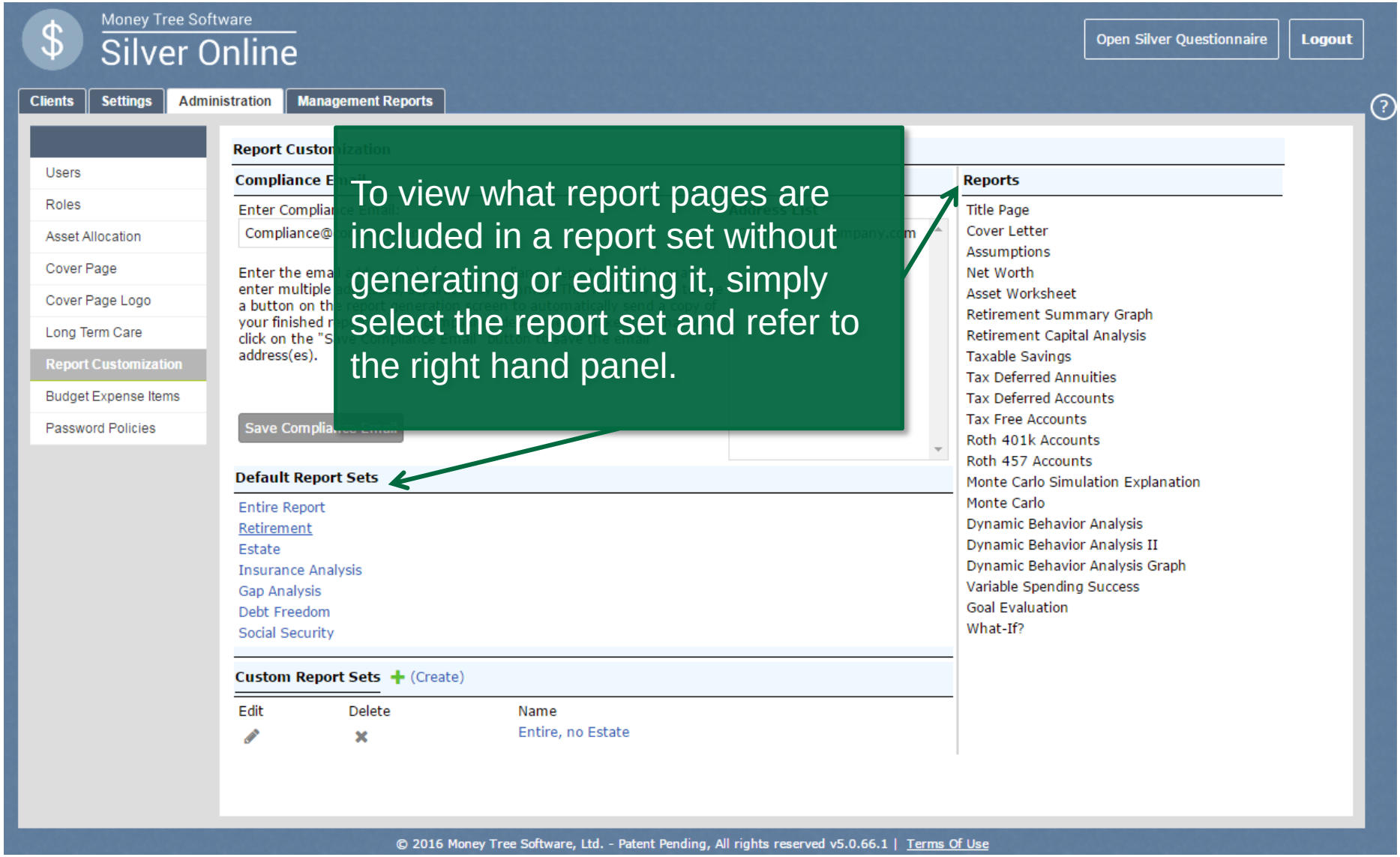
You can change the report pages that appear in the Available Pages pane by changing the selection in the Reports Sections pane. Select the pages you want to have in your custom report and click add or add all. Give the new report a name in the box at the top of the section, then select update.

Administration: Report Customization



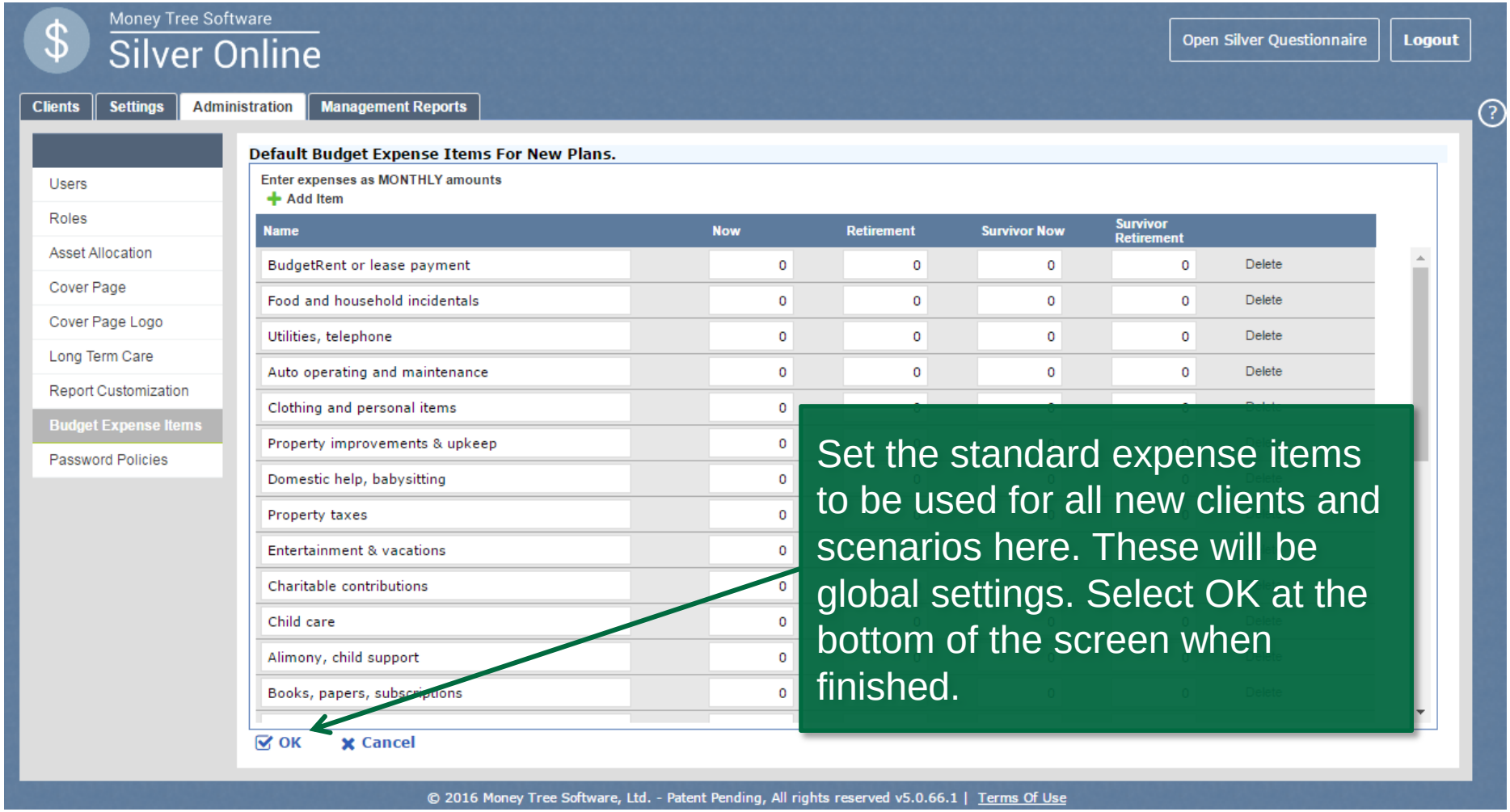
To edit already created Custom Report sets, select the pencil icon in line with that title in the custom reports section.
You can also delete Custom Reports, but they are not recoverable once deleted.

Administration: Report Customization



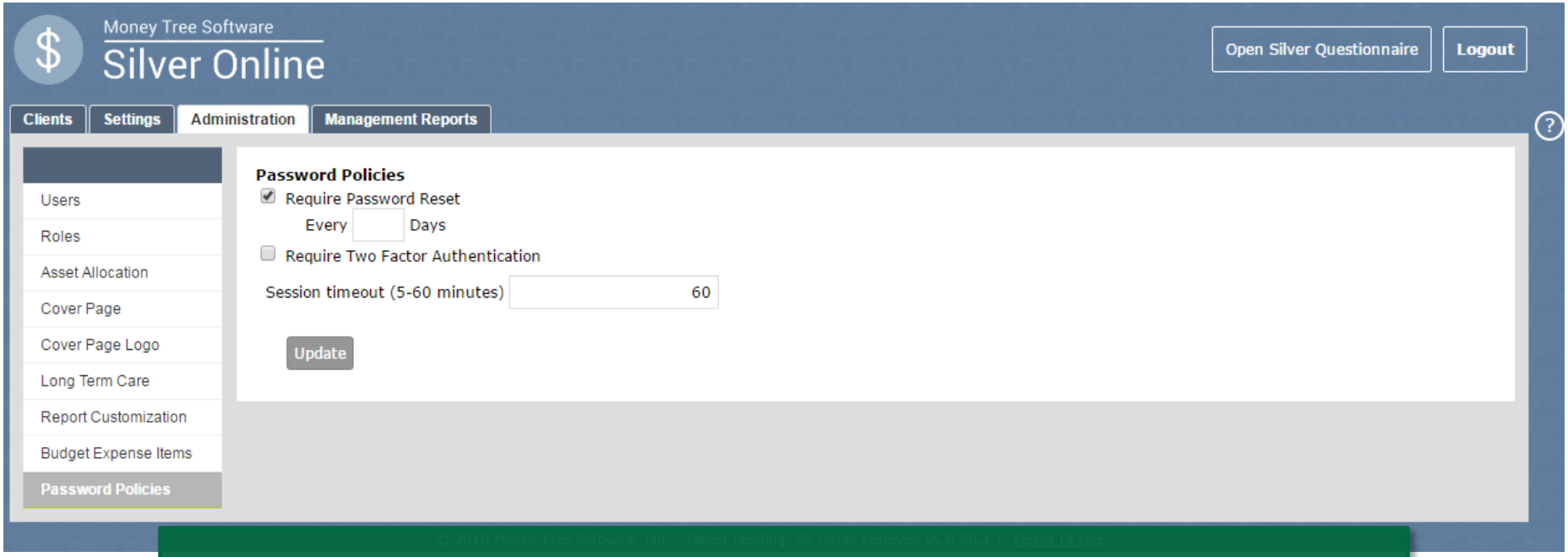
To view what report pages are included in a report set without generating or editing it, simply select the report set and refer to the right hand panel.

Administration: Budget Expense Items



Set the standard expense items to be used for all new clients and scenarios here. These will be global settings. Select OK at the bottom of the screen when finished.

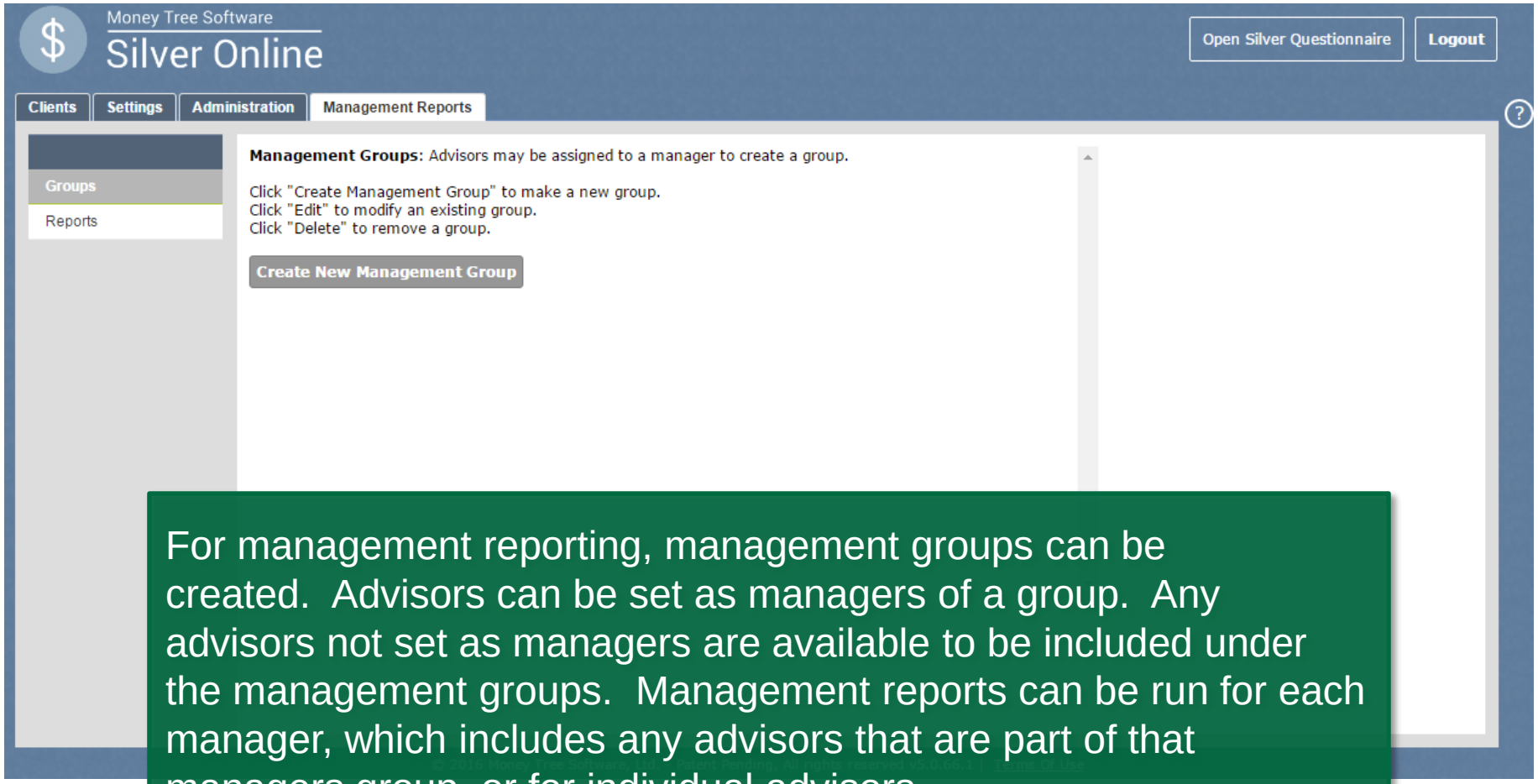
Administration:Budget Expense Items



Set the password policies for your company here.

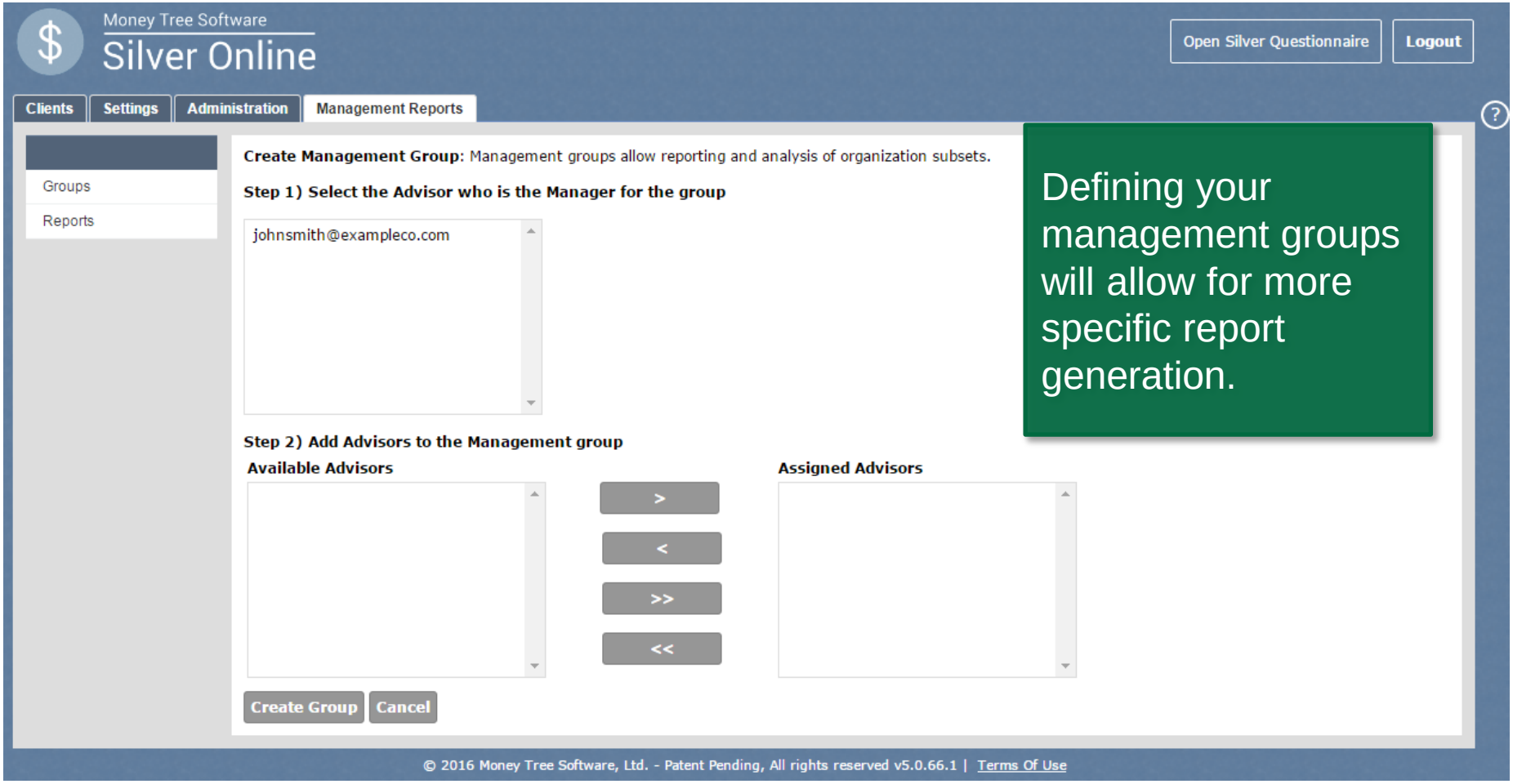
Two factor authentication will send you a code to enter when you are logging into Silver Online, meaning you must have access to the email you have linked to your user information.
If you select Require Password Reset, you will be given the opportunity to have to program prompt you to change your password every period of days that you set it to.

Management Reports: Groups



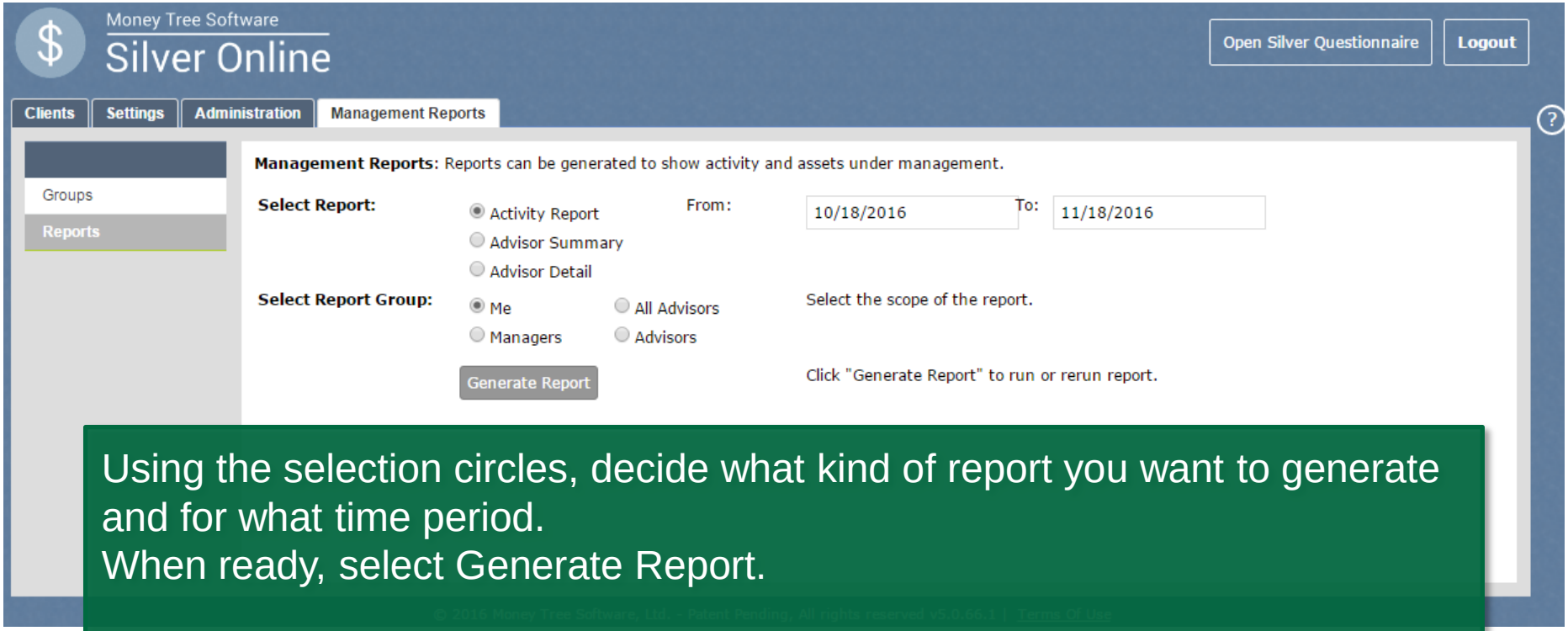
For management reporting, management groups can be created. Advisors can be set as managers of a group. Any advisors not set as managers are available to be included under the management groups. Management reports can be run for each manager, which includes any advisors that are part of that managers group, or for individual advisors.

Management Reports: Groups



Defining your management groups will allow for more specific report generation.

Management Reports: Reports



Using the selection circles, decide what kind of report you want to generate and for what time period.
When ready, select Generate Report.

1. **Activity Report** – Displays Silver Online activity for the period selected. The Activity Report will list the number of total clients, newly created clients, scenarios modified, reports and "What-If?" calculations generated.
2. **Advisor Summary** – Displays the advisor's total clients, assets, qualified assets, non-qualified assets, liabilities and insurance.

Getting Started:
How to use Silver Online

Thank you for taking the time to review Silver's Getting Started guide.

Questions?

Ask Money Tree's Support Team

Toll free 1.877.421.9815
support@moneytree.com