

Silver Online User Guide



Setup, Settings, and Administration

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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

Money Tree Software
Silver Online

Open Silver Questionnaire Login

Welcome to Silver Online
Log in using your email address and password

Email Address:

Password:

Log In

Welcome to Silver Online

- Efficient Planning Online
- Fast, Secure Data Entry
- Interactive "What If?" Feature
- Side-by-Side Scenario Comparison
- Client Access to Planning Data and Reports
- [Learn More!](#)


[Sign Up For A Free 30 Day Trial](#)

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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



Money Tree Software
Silver Online

Open Silver QuestionnaireLogout

ClientsSettingsAdministrationManagement Reports

Search

Add Client

Import Client

Search For A Client

AdvisorAll Advisors

Last Name

Search

	First Name	Last Name	Bir
Open	Nancy	Norwood	12/30/1955
Open	Sam	Client	10/30/1965
Open	John	Johnson	12/30/1955
Open	Ron	Rich	10/30/1965
Open	Robert	Smith	1/1/1970
Open	Ken	Kind	12/30/1955
Open	Jane	Smith	1/1/1970
Open	Henry	Holfer	10/30/1961
Open	Ed	Estate	1/1/1983
Open	Brent	Basic	10/30/1961
Open	John	Sample	1/1/1965
Open	Tom	Test	1/1/1970
Open	John	Doe	3/27/1957

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

The screenshot shows the Money Tree Software Silver Online interface. The top navigation bar includes the Money Tree Software logo, the text "Silver Online", and buttons for "Open Silver Questionnaire" and "Logout". Below this, a client-specific header shows "Client: Allen Abbett" and "Plan: Allen's 2011 Financial Plan(Copy)". The main content area is divided into a left sidebar with navigation links (Inputs, Names/Ages, Risk, Estate, Insurance, Income/Pension/SS, Expenses, Special Income, Special Expense/Goal, Education Funding, Assets, Asset Allocation, Other Assets/Debts, Debt Freedom, Rates, Behavior Analysis, Reports, Graphs, What If?) and a central form area. The form area is titled "Names For Report Heading" and contains a checkbox for "Use Alternate Report Date" (checked), a date input field showing "4/8/2016", and a section for "Individual #1" with fields for First Name (Allen), Middle Initial, Last Name (Abbett), Birth Date (04/07/1968), Age (48), Planned Retirement Age (65), Life Expectancy-Calculated (85), Alternate Life Expectancy (86), and Married Couple (Yes). At the bottom of the form are "Save" and "Save & Continue" buttons. A green callout box with white text is overlaid on the right side of the interface, pointing to a red question mark icon in the top right corner. The callout text reads: "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."

Money Tree Software
Silver Online

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

Inputs
Names/Ages
Risk
Estate
Insurance
Income/Pension/SS
Expenses
Special Income
Special Expense/Goal
Education Funding
Assets
Asset Allocation
Other Assets/Debts
Debt Freedom
Rates
Behavior Analysis
Reports
Graphs
What If?

Names For Report Heading Names for Report Heading

☒ Use Alternate Report Date 4/8/2016

Edit Contact Info

Individual #1
First Name Allen
Middle Initial
Last Name Abbett
Birth Date 04/07/1968
Age 48
Planned Retirement Age 65
Life Expectancy-Calculated 85
Alternate Life Expectancy 86
Married Couple Yes

Save Save & Continue

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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

Help Server © 2005 X-tensive.com
Express Edition limit is 47% reached

print



Expand Silver Online Help section if not already open.

Silver Online

Welcome to Silver Online. Please choose from the following topics:

- [Getting Started](#)
- [Help Topics](#)
- [Tech Notes](#)

Related Topics: [Getting Started](#) | [Help Topics](#)

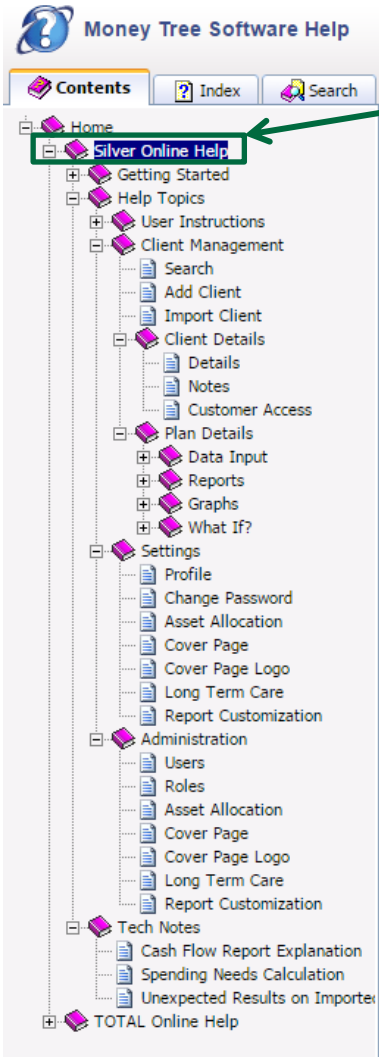
support@moneytree.com | www.moneytree.com

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[Send comments on this topic.](#)

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

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

[Open Silver Questionnaire](#) [Logout](#)

Inputs

Names/Ages

Risk

Estate

Insurance

Income/Pension/SS

Expenses

Special Income

Age 48

Education

Assets

Other

Debt

Rat

Beh

Re

Gr

Wh

Names For Report Heading

Names for Report Heading

☒ Use Alternate Report Date 4/8/2016

[Edit Contact Info](#)

Individual #1

First Name Allen

Middle Initial

Last Name Abbett

Birth Date 04/07/1968

Individual #2

Middle Initial

Last Name Abbett

Birth Date 01/01/1968

Age 48

Planned Retirement Age 63

Life Expectancy-Calculated 90

Alternate Life Expectancy 91

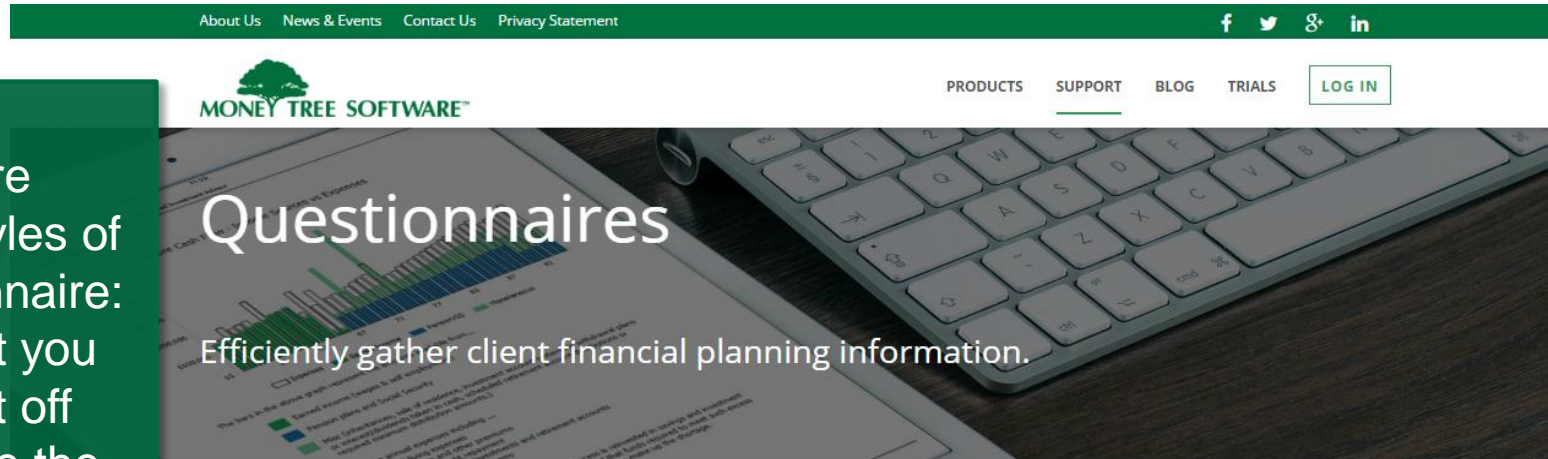
[Save](#) [Save & Continue](#)

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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)

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

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.

Program questionnaires collect all the information from your client required to complete the projections for the financial planning software. The questionnaires match the data input order of the program, aiding in the straightforward entry of client data. Questionnaires are available through your program by going to the help menu and selecting questionnaires.

Silver: Big-Picture Planning

Gather client data for a financial plan in Silver:

- Silver - Print Style
- Silver - Fillable Style

Gather all data for a financial plan in Silver, including planning assumptions such as rates of return, inflation, etc.:

- Silver Detailed - Fillable Style

Customer Support

- 877-421-9815 ext. 0
- support@moneytree.com
- [Send a Support Request](#)

Training Options

- [Training Videos](#)
- [User Guides](#)
- [Schedule Training](#)

Planner Resources

- [Tech Notes](#)
- [Questionnaires](#)
- [Planner Guides \(White Papers\)](#)

Settings Tab

Money Tree Software
Silver Online

Open Silver Questionnaire Logout

Clients Settings Administration Management Reports

Profile
Change Password
Budget Expense Items

Modify: User@moneytree.com

First Name:

Last Name:

Title:

Work Phone:

Mobile Phone:

Update

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

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

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LPL Financial Version

Money Tree Software
Silver Online

Open Silver Questionnaire Logout

Clients Settings Administration Management Reports

Profile
Change Password
Budget Expense Items

Change Password

Old Password:

New Password:

Confirm New Password:

Update Password

Password: change the password here

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LPL Financial Version

Settings Tab

Money Tree Software
Silver Online

Clients Settings Administration Management Reports

Profile
Change Password
Budget Expense Items

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.

Enter expenses as MONTHLY amounts
+ Add Item Import From Administration Tab

Name	Now	Retirement	Survivor Now	Survivor Retirement	
Rent or lease payment	0	0	0	0	Delete
Food and household incidentals	0	0	0	0	Delete
Utilities, telephone	0	0	0	0	Delete
Auto operating and maintenance	0	0	0	0	Delete
Clothing and personal items	0	0	0	0	Delete
Property improvements & upkeep	0	0	0	0	Delete
Domestic help, babysitting	0	0	0	0	Delete
Property taxes	0	0	0	0	Delete
Entertainment & vacations	0	0	0	0	Delete
Charitable contributions	0	0	0	0	Delete
Child care	0	0	0	0	Delete
Alimony, child support	0	0	0	0	Delete
Books, papers, subscriptions	0	0	0	0	Delete

☒ OK ☐ Cancel

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

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Administration Tab

The screenshot shows the 'Administration' tab selected in the 'Silver Online' software. The left sidebar contains a menu with 'Users' highlighted. The main content area has a header with instructions on creating and managing users, followed by a 'Create User' button and a table of existing users.

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

New user logins can be created here. You may give a user Administrator privileges. Administrators can add new users as well as define roles. They can also define custom report sets viewable by all users.

Click the to edit the personal information for the selected user.
Click the to change the password for the selected user.
Click the to assign roles to the selected user.

Create User

	Email	First Name	Last Name	Title	Active	Admin	
	paul.planner@exampleadvisors.com	Paul	Planner	Partner	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
	andy.admin@advisorexample.com	Andy	Admin	Administrator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	✕
	johnsmith@exampleco.com	John	Smith		<input checked="" type="checkbox"/>	<input type="checkbox"/>	✕

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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

The screenshot shows the 'Administration' tab selected in the 'Silver Online' software. The interface includes a top navigation bar with 'Clients', 'Settings', 'Administration', and 'Management Reports'. A left sidebar lists various settings like 'Users', 'Roles', 'Asset Allocation', etc. The main content area provides instructions on creating and managing users, a 'Create User' button, and a table of existing users with icons for editing, password changes, role assignment, and deletion.

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

New user logins can be created here. You may give a user Administrator privileges. Administrators can add new users as well as define roles. They can also define custom report sets viewable by all users.

Click the to edit the personal information for the selected user.
Click the to change the password for the selected user.
Click the to assign roles to the selected user.

Create User

	Email	First Name	Last Name	Title	Active	Admin	
	paul.planner@exampleadvisors.com	Paul	Planner	Partner	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
	andy.admin@advisorexample.com	Andy	Admin	Administrator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	✕
	johnsmith@exampleco.com	John	Smith		<input checked="" type="checkbox"/>	<input type="checkbox"/>	✕

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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

The screenshot shows the 'Silver Online' administration interface. The top navigation bar includes 'Clients', 'Settings', 'Administration' (selected), and 'Management Reports'. A sidebar on the left lists various settings: Users, Roles, Asset Allocation, Cover Page, Cover Page Logo, Long Term Care, Report Customization, Budget Expense Items, and Password Policies. The main content area displays a form for creating a new user. At the top of the form, a message states: 'Your account allows 4 users to be created. To purchase more user accounts please contact sales at (877) 421-9815.' The form fields include: Email, Password, Confirm Password, First Name, Last Name, Title, Active (checked), and Administrator (unchecked). A 'Create User' button is located at the bottom of the form. A green callout box on the right side of the form contains the text: 'Please Note: You must have subscribed for more than one user to have this function be available.'

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

**Your account allows 4 users to be created.
To purchase more user accounts please contact sales at (877) 421-9815.**

Email:

Password:

Confirm Password:

First Name:

Last Name:

Title:

Active: ☒

Administrator: ☐

Create User

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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

The screenshot shows the 'Administration' section of the 'Silver Online' interface. The left sidebar contains a menu with 'Roles' highlighted. The main content area has a header explaining that roles define security restrictions and provides instructions on how to assign roles using a user icon. Below this is an 'Add Role' button and a table of existing roles. The footer contains copyright information and a link to the Terms of Use.

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

Roles allow you to define a set of security restrictions for your employees. If no roles are defined then users can access all areas of the application (except the Administration area).

Click the icon to assign a user to a role.
Click on the name of the role to edit permissions for that role.

Add Role

Name	Description	
Can See All Clients	1	×
Full Access		×
Admin - No Access to Clients		×
Assistant - Limited Role		×

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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

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

Name: Can See All Clients

Description: 1

Security Settings

Client Management User Settings


- ☒ View/edit all contacts
 - If checked, users can search for contacts that belong to ANY advisor. If unchecked, users can only see contacts that are assigned to them.
- ☒ Allow import contact
 - If checked, users can import Silver Financial Planner files (sfp) and Secure Online Planner (sops) files.
- ☐ Allow export contacts / plans
 - If checked, users can export plans from the system.
- ☐ Delete a contact
 - If checked, users can permanently delete contacts from the system.

Update Cancel

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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



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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	Abbrev.	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	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

Update

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

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.

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

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Asset Allocation

Silver Online

Open Silver Questionnaire Logout

Clients Settings Administration Management Reports

Users
Roles
Asset Allocation
Cover P...
Cover P...
Long Te...
Report C...
Budget...
Passwo...

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

	Accumulation Portfolios					Retirement Portfolios					Later Life Portfolios				
Abbrev.	1	2	3	4	5	1	2	3	4	5	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
	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

Update

Columns 1, 2, 3, 4, 5 - These columns represent the risk tolerance level of the portfolio.
Column # Risk Tolerance Level
1. Very Conservative
2. Somewhat Conservative
3. Moderate
4. Somewhat Aggressive
5. Aggressive

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.

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Administration: Cover Page

\$

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Silver Online

Open Silver QuestionnaireLogout

ClientsSettingsAdministrationManagement Reports

UsersRolesAsset AllocationCover PageCover Page LogoLong Term CareReport CustomizationBudget Expense ItemsPassword Policies

Advisor Information

Cover Page Caption	Personal Financial Plan
Report Header Text	Personal Financial Plan
Name or Company Name	Silver Financial Planner
Street Address	2430 NW Professional Dr
City, State, Zip	Corvallis, OR 97330
Telephone Number	541.754.3701

The following text will appear on the cover page of the reports you create. Format the text as you would like it to appear on that report.

Text AlignmentCenter

The following text will appear at the bottom of all report pages below the standard disclaimer.

Update

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

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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

The screenshot shows the Money Tree Software Silver Online interface. The top navigation bar includes a dollar sign icon, the text "Money Tree Software Silver Online", and buttons for "Open Silver Questionnaire" and "Logout". Below this is a secondary navigation bar with tabs for "Clients", "Settings", "Administration", and "Management Reports". The "Administration" tab is selected, and a sidebar on the left lists various administrative options: "Users", "Roles", "Asset Allocation", "Cover Page", "Cover Page Logo", "Long Term Care" (highlighted), "Report Customization", "Budget Expense Items", and "Password Policies". The main content area is titled "Daily Long Term Care Cost Defaults" and contains a table with three rows: "LTC Low" with a value of 125, "LTC Medium" with a value of 200, and "LTC High" with a value of 275. Each value is in a text input field. Below the table is an "Update" button. At the bottom of the interface, a footer line reads: "© 2016 Money Tree Software, Ltd. - Patent Pending, All rights reserved v5.0.66.1 | Terms Of Use".

Daily Long Term Care Cost Defaults	
LTC Low	125
LTC Medium	200
LTC High	275

[Update](#)

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

The screenshot displays the 'Silver Online' administration interface for Money Tree Software. The top navigation bar includes 'Clients', 'Settings', 'Administration' (selected), and 'Management Reports'. The sidebar on the left lists various settings: Users, Roles, Asset Allocation, Cover Page, Cover Page Logo, Long Term Care, **Report Customization** (highlighted), Budget Expense Items, and Password Policies. The main content area is titled 'Report Customization' and contains the following sections:

- Compliance Email**: Includes a text input field labeled 'Enter Compliance Email:' and a 'Save Compliance Email' button. Below the input field, instructions state: 'Enter the email address(es) of your compliance department. You may enter multiple addresses, separated by commas. This will allow you to use a button on the report generation screen to automatically send a copy of your finished report to your compliance department. Make sure that you click on the "Save Compliance Email" button to save the email address(es).'
- Address List**: A list box for adding email addresses.
- Default Report Sets**: A list of report types: Entire Report, Retirement, Estate, Insurance Analysis, Gap Analysis, Debt Freedom, and Social Security.
- Custom Report Sets**: A section with a '+ (Create)' button.

A green callout box on the right side of the interface provides instructions: '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.'

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Administration: Report Customization

The screenshot shows the 'Administration' tab selected in the top navigation bar. On the left, a sidebar lists various settings: Users, Roles, Asset Allocation, Cover Page, Cover Page Logo, Long Term Care, Report Customization (highlighted), Budget Expense Items, and Password Policies. The main content area is titled 'Report Customization' and features a 'Report Name' input field at the top. Below this are two panels: 'Report Sections' and 'Available Pages'. The 'Report Sections' panel contains a list of sections: All Reports, General, Estate, Insurance, and Retirement. The 'Available Pages' panel contains a list of pages: Title Page, Cover Letter, Summary, Assumptions, Net Worth, Asset Worksheet, Asset Allocation, Asset Allocation Graph, Retirement Profile, Resources Available For Retirement, Retirement Summary Graph, Monte Carlo Simulation Explanation, Monte Carlo, and Dynamic Behavior Analysis. Between these panels are four buttons: 'Add >>', 'Add All >>', '<< Delete', and '<< Delete All'. To the right of the 'Report Sections' panel is a 'Selected Pages' panel, which is currently empty. At the bottom of the main content area are 'Update' and 'Cancel' buttons. In the top right corner, there are 'Open Silver Questionnaire' and 'Logout' buttons. A green callout box on the right side of the interface contains the following text: '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.'

Money Tree Software
Silver Online

Open Silver Questionnaire Logout

Clients Settings Administration Management Reports

Report Name

Report Sections

- All Reports
- General
- Estate
- Insurance
- Retirement

Available Pages

- Title Page
- Cover Letter
- Summary
- Assumptions
- Net Worth
- Asset Worksheet
- Asset Allocation
- Asset Allocation Graph
- Retirement Profile
- Resources Available For Retirement
- Retirement Summary Graph
- Monte Carlo Simulation Explanation
- Monte Carlo
- Dynamic Behavior Analysis

Add >> Add All >> << Delete << Delete All

Selected Pages

Update Cancel

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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

Money Tree Software
Silver Online

Open Silver Questionnaire Logout

Clients Settings Administration Management Reports

Report Customization

Compliance Email

Enter Compliance Email:
Compliance@company.com

Enter the email address(es) of your compliance department. You may enter multiple addresses, separated by commas. This will allow you to use a button on the report generation screen to automatically send a copy of your finished report to your compliance department. Make sure that you click on the "Save Compliance Email" button to save the email address(es).

Save Compliance Email

Address List

Compliance@company.com

Default Report Sets

- Entire Report
- Retirement
- Estate
- Insurance Analysis
- Gap Analysis
- Debt Freedom
- Social Security

Custom Report Sets + (Create)

Edit	Delete	Name
		Entire, no Estate

Reports

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.

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Administration: Report Customization

The screenshot displays the 'Silver Online' administration interface. The top navigation bar includes 'Clients', 'Settings', 'Administration', and 'Management Reports'. The left sidebar lists various administration tasks, with 'Report Customization' highlighted. The main content area is divided into two panels. The left panel, titled 'Report Customization', contains a 'Compliance E' section with a form for entering compliance email addresses and a 'Default Report Sets' section listing various report categories like 'Entire Report', 'Retirement', 'Estate', etc. The right panel, titled 'Reports', lists individual report pages such as 'Title Page', 'Cover Letter', 'Assumptions', 'Net Worth', 'Asset Worksheet', 'Retirement Summary Graph', 'Retirement Capital Analysis', 'Taxable Savings', 'Tax Deferred Annuities', 'Tax Deferred Accounts', 'Tax Free Accounts', 'Roth 401k Accounts', 'Roth 457 Accounts', 'Monte Carlo Simulation Explanation', 'Monte Carlo', 'Dynamic Behavior Analysis', 'Dynamic Behavior Analysis II', 'Dynamic Behavior Analysis Graph', 'Variable Spending Success', 'Goal Evaluation', and 'What-If?'. A green callout box with white text is overlaid on the interface, stating: '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.' Two green arrows point from the callout box to the 'Default Report Sets' and 'Reports' panels.

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

Report Customization

Compliance E

Enter Compliance email address(es).
Compliance@

Enter the email address(es) for the report set. You can enter multiple email addresses separated by commas. After you click on the "Save Compliance" button, the report set will be generated and you will be able to view the report set.

Save Compliance

Default Report Sets

Entire Report
Retirement
Estate
Insurance Analysis
Gap Analysis
Debt Freedom
Social Security

Custom Report Sets + (Create)

Edit	Delete	Name
		Entire, no Estate

Reports

Title Page
Cover Letter
Assumptions
Net Worth
Asset Worksheet
Retirement Summary Graph
Retirement Capital Analysis
Taxable Savings
Tax Deferred Annuities
Tax Deferred Accounts
Tax Free Accounts
Roth 401k Accounts
Roth 457 Accounts
Monte Carlo Simulation Explanation
Monte Carlo
Dynamic Behavior Analysis
Dynamic Behavior Analysis II
Dynamic Behavior Analysis Graph
Variable Spending Success
Goal Evaluation
What-If?

Administration: Budget Expense Items

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Money Tree Software
Silver Online

Open Silver QuestionnaireLogout

ClientsSettingsAdministrationManagement Reports

UsersRolesAsset AllocationCover PageCover Page LogoLong Term CareReport CustomizationBudget Expense ItemsPassword Policies

Default Budget Expense Items For New Plans.

Enter expenses as MONTHLY amounts
+ Add Item

Name	Now	Retirement	Survivor Now	Survivor Retirement	
BudgetRent or lease payment	0	0	0	0	Delete
Food and household incidentals	0	0	0	0	Delete
Utilities, telephone	0	0	0	0	Delete
Auto operating and maintenance	0	0	0	0	Delete
Clothing and personal items	0				Delete
Property improvements & upkeep	0				Delete
Domestic help, babysitting	0				Delete
Property taxes	0				Delete
Entertainment & vacations	0				Delete
Charitable contributions	0				Delete
Child care	0				Delete
Alimony, child support	0				Delete
Books, papers, subscriptions	0				Delete

☒ OK☐ Cancel

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.

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Administration: Budget Expense Items

The screenshot displays the 'Silver Online' administration interface. At the top, there's a header with the Money Tree Software logo and 'Silver Online' text. Navigation tabs include 'Clients', 'Settings', 'Administration', and 'Management Reports'. The 'Administration' tab is active, and a sidebar on the left lists various settings: Users, Roles, Asset Allocation, Cover Page, Cover Page Logo, Long Term Care, Report Customization, Budget Expense Items, and Password Policies (which is highlighted). The main content area is titled 'Password Policies' and contains the following settings:

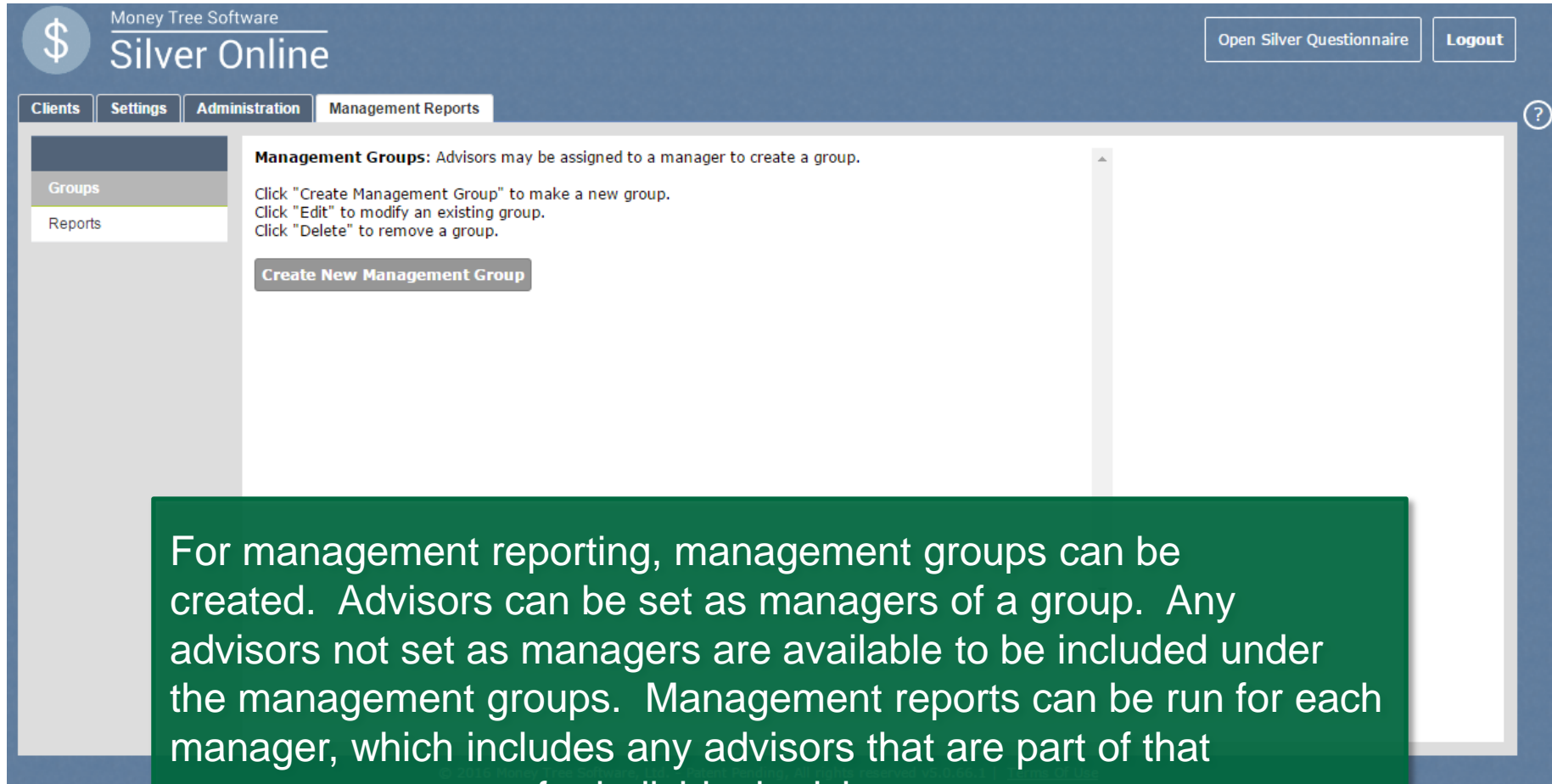
- ☒ Require Password Reset
Every Days
- ☐ Require Two Factor Authentication
- Session timeout (5-60 minutes)
-

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



The screenshot displays the Money Tree Software Silver Online interface. The top navigation bar includes the Money Tree Software logo, the text "Silver Online", and buttons for "Open Silver Questionnaire" and "Logout". Below this, a secondary navigation bar contains tabs for "Clients", "Settings", "Administration", and "Management Reports". The "Management Reports" tab is active, showing a sidebar with "Groups" and "Reports" options. The main content area is titled "Management Groups: Advisors may be assigned to a manager to create a group." and includes instructions: "Click 'Create Management Group' to make a new group.", "Click 'Edit' to modify an existing group.", and "Click 'Delete' to remove a group." A button labeled "Create New Management Group" is visible.

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

Money Tree Software
Silver Online

Open Silver Questionnaire Logout

Clients Settings Administration **Management Reports**

Groups
Reports

Create Management Group: Management groups allow reporting and analysis of organization subsets.

Step 1) Select the Advisor who is the Manager for the group

johnsmith@exampleco.com

Step 2) Add Advisors to the Management group

Available Advisors

Assigned Advisors

> < >> <<

Create Group Cancel

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

Management Reports: Reports

The screenshot shows the Money Tree Software Silver Online interface. The top navigation bar includes a dollar sign icon, the text "Money Tree Software Silver Online", and buttons for "Open Silver Questionnaire" and "Logout". Below this is a secondary navigation bar with tabs for "Clients", "Settings", "Administration", and "Management Reports". The "Management Reports" tab is active. On the left, a sidebar menu shows "Groups" and "Reports" (highlighted). The main content area is titled "Management Reports: Reports can be generated to show activity and assets under management." It contains a "Select Report:" section with three radio buttons: "Activity Report" (selected), "Advisor Summary", and "Advisor Detail". To the right of these is a date range selector with "From:" and "To:" fields, both containing "10/18/2016". Below the "Select Report:" section is a "Select Report Group:" section with four radio buttons: "Me" (selected), "All Advisors", "Managers", and "Advisors". To the right of these is the text "Select the scope of the report." and a "Generate Report" button. At the bottom right, a note says "Click 'Generate Report' to run or rerun report."

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