

# User Guide

## Setup, Settings, & Administration

Moneytree Advise



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# Logging In

To log in to **Moneytree Advise**, you can either start at our company website [moneytree.com](http://moneytree.com) and select the Log In button in the top right corner, or you can go straight to [\* update with **Advise** URL]

moneytree

Open Planner Questionnaire Login

Welcome to Moneytree Advise  
Log in using your email address and password

Email Address: moneytree\_sample@moneytree.com

Password: .....

Log In

Forgot your password?

Welcome to Moneytree Advise

- 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!](#)

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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

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.

The screenshot displays the Money Tree software interface. At the top left is the Money Tree logo. On the right side of the header, there are buttons for 'Open Planner Questionnaire' and 'Logout'. Below the header, there are navigation links for 'Alerts', 'Help', and 'Settings'. The main content area is titled 'Clients' and features a sidebar with options: 'Clients', 'Search', 'Add Client', and 'Import Client'. The central part of the interface has a 'Search For A Client' section with a search input field and a dropdown menu set to 'All Advisors'. Below this is a table with the following data:

	First Name	Last Name	Birth Date	Phone	Last Updated Plan	
Open	John	Sample	1/1/1968		8/5/2020 10:22:30 AM	X

At the bottom of the interface, there is a copyright notice: '© 2020 Money Tree Software, Ltd. - All rights reserved v5.0.215.0 | Terms Of Use Licensed through 1/1/2025'.

# Online Help Guide

The screenshot displays the Money Tree software interface. At the top left is the Money Tree logo. The top right contains buttons for "Open Planner Questionnaire" and "Logout". Below the logo, there are tabs for "Clients", "Client: John Sample", and "Plan: Sample Client". On the right side, there are icons for "Alerts", "Help" (a question mark), and "Settings".

The main content area is divided into a left sidebar and a main panel. The sidebar has sections for "Inputs" (with sub-items: Names/Ages, Risk, Estate, Insurance, Income/Pension/SS, Expenses, Special Income, Special Expense/Goal, Education Funding, Investments, Asset Allocation, Other Assets, Debts, Rates) and "Reports" (with sub-items: Graphs, What If?). The main panel shows a form for "Sample Client" with fields for Plan, Description, Report Heading, and Use Alternate Report Date (8/5/2020). Below this is an "Edit Contact Info" button and a section for "Individual #1" with fields for First Name, Middle Initial, Last Name, Birth Date, Age, Planned Retirement Age, Life Expectancy-Calculated, Alternate Life Expectancy, and Married Couple.

A green callout box on the right side of the screenshot contains the following text:

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 to the section you are currently in within Advise and will have more detailed information on the inputs and the report page outputs.

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# Settings: Profile & Change Password

The screenshot shows the MoneyTree interface with the 'Settings' tab selected. Under 'Personal Settings', the 'Profile' sub-tab is active. The page title is 'Modify: moneytree\_sample@moneytree.com'. The form contains the following fields: First Name (John), Last Name (Sample), Title (CFP®), Work Phone, and Mobile Phone. A sidebar on the left lists various settings categories, with 'Personal Settings' expanded to show 'Profile' as the selected option.

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

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

The screenshot shows the MoneyTree interface with the 'Settings' tab selected. Under 'Personal Settings', the 'Change Password' sub-tab is active. A warning message states: 'Password must be at least 8 characters long, contain both upper and lower case letters, and at least one number.' The form includes three password input fields: 'Old Password', 'New Password', and 'Confirm New Password'. An 'Update Password' button is located below the fields. The sidebar on the left shows 'Personal Settings' expanded, with 'Change Password' selected.

Change Password:  
Update the password here





# Settings: Cover Page

**moneytree**

Clients Settings

**Personal Settings**

- Profile
- Change Password
- Asset Allocation
- Cover Page**
- Cover Page Logo
- Long Term Care
- Report Customization
- Budget Expense Items
- Defaults
- Client Access Defaults
- Compliance

**Company Settings**

- Administration**
- Management Reports

**Advisor Information**

Cover Page Caption

Report Header Text

Name or Company Name

Street Address

City, State, Zip

Telephone Number

**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 Alignment

**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.**

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# Settings: Cover Page Logo

The screenshot shows the MoneyTree web application interface. At the top left is the MoneyTree logo. Below it are tabs for 'Clients' and 'Settings'. The 'Settings' tab is active, and a sidebar menu on the left lists various settings categories: Personal Settings, Cover Page Logo (highlighted), Long Term Care, Report Customization, Budget Expense Items, Defaults, and Client Access Defaults. The main content area displays the MoneyTree logo and a file upload interface with a 'Choose File' button, a text field showing 'No file chosen', and 'Upload Image' and 'Clear Current Image' buttons. A green callout box at the bottom of the screenshot contains the following text: 'You can upload your company logo to appear on the cover page. Use a .jpg image measuring 200x200 pixels approximately.' At the bottom right of the page, there is a footer with the text: '© 2020 Money Tree Software, LLC. All rights reserved. 05.0.215.01 Terms Of Use Licensed through 1/1/2025'.

# Settings: Long Term Care

The screenshot shows the Moneytree interface. At the top left is the Moneytree logo. Below it are two tabs: 'Clients' and 'Settings'. Under 'Settings', there is a sidebar with 'Personal Settings' and 'Long Term Care'. The 'Long Term Care' section is active, showing a table of default costs.

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

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*.

# Settings: Report Customization

The screenshot displays the Money Tree software interface for report customization. At the top left is the Money Tree logo. The top right contains buttons for 'Open Planner Questionnaire' and 'Logout'. Below the logo is a navigation bar with 'Clients' and 'Settings' tabs. The left sidebar lists various settings categories: Personal Settings (Profile, Change Password, Asset Allocation, Cover Page, Cover Page Logo, Long Term Care), Report Customization (Budget Expense Items, Defaults, Client Access Defaults, Compliance), Company Settings, Administration, and Management Reports. The main content area is titled 'Report Customization' and features a 'Report Name' input field at the top. Below it are three panels: 'Report Sections' (listing 'All Reports', 'General', 'Estate', 'Insurance', 'Retirement', 'Debt Freedom', 'Social Security'), 'Available Pages' (listing 'Title Page', 'Cover Letter', 'Summary', 'Assumptions', 'Net Worth', 'Asset Worksheet', 'Asset Allocation Graph', 'Retirement Profile', 'Resources Available For Retirement', 'Retirement Summary Graph', 'Monte Carlo Simulation Explanation', 'Monte Carlo', 'Dynamic Behavior Analysis', 'Dynamic Behavior Analysis II'), and 'Selected Pages' (currently empty). Between 'Available Pages' and 'Selected Pages' are buttons for 'Add >>', 'Add All >>', '<< Delete', and '<< Delete All'. At the bottom of the 'Available Pages' panel are 'Update' and 'Cancel' buttons. A 'Report Page Preview' panel is also visible on the right. 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.'

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# Settings: Report Customization

**moneytree**

Clients Settings

**Personal Settings**

- Profile
- Change Password
- Asset Allocation
- Cover Page
- Cover Page Logo
- Long Term Care

**Report Customization**

- Budget Expense Items
- Defaults
- Client Access Defaults
- Compliance

**Company Settings**

- Administration
- Management Reports

**Report Customization**

**Default Report Sets**

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

**Custom Report Sets** + (Create)

Edit	Delete	Name
		Sample custom report set

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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# Settings: Report Customization

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Clients Settings

**Personal Settings**

- Profile
- Change Password
- Asset Allocation
- Cover Page
- Cover Page Logo
- Long Term Care

**Report Customization**

- Budget Expense Items
- Defaults
- Client Access Defaults
- Compliance

**Company Settings**

- Administration
- Management Reports

**Report Customization**

**Default Report Sets**

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

**Custom Report Sets** + (Create)

Edit	Delete	Name
		<a href="#">Sample custom report set</a>

**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?

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.

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# Settings: Budget Expense Items



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

Clients Settings

## Personal Settings

- Profile
- Change Password
- Asset Allocation
- Cover Page
- Cover Page Logo
- Long Term Care
- Report Customization

## Budget Expense Items

- Defaults
- Client Access Defaults
- Compliance

## Company Settings

- Administration
- Management Reports

Enter expenses as MONTHLY amounts

+ Add Item Import From Company Settings

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					
Alimony, child support					
Books, papers, subscriptions					
Home furnishings					

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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# Settings: Defaults

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Clients Settings

**Personal Settings**

- Profile
- Change Password
- Asset Allocation
- Cover Page
- Cover Page Logo
- Long Term Care
- Report Customization
- Budget Expense Items
- Defaults**
- Client Access Defaults
- Compliance

**Company Settings**

**Administration**

**Management Reports**

**Income**

Earned income increase rate

Annual increase rate for S.S. benefits

Do not capitalize pre-retirement pension and Social Security benefits.

**Living Expenses Inflation %**

Current annual expenses

Annual current expenses for a surviving household now

Annual expenses during retirement

Annual expenses for a survivor in retirement

**Education Funding**

Inflation Rate for Future Education Costs

After-tax Rate of Return for College fund growth

Include net cost of education expenses in retirement calculations.

**Rates**

	Before Retirement	After Retirement
Rates of Return on Taxable Assets	<input type="text" value="8 %"/>	<input type="text" value="8 %"/>
Rate of Return on Tax Free Assets	<input type="text" value="4 %"/>	<input type="text" value="4 %"/>
Rate of Return on Tax Deferred & Roth Assets	<input type="text" value="8 %"/>	<input type="text" value="8 %"/>
Rate of Return on Annuity Assets	<input type="text" value="8 %"/>	<input type="text" value="8 %"/>
Average Tax Rate (federal + state) to apply to income, interest & other taxable events	<input type="text" value="20 %"/>	<input type="text" value="18 %"/>

Proportionalize First Year Calculations

Use Fat Tails

**Increase Rates for Capital Additions - the % annual additions will be increased for inflation**

Savings & Investment Accounts

IRA/401k/TSA Accounts

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Set default rates that will be used for every new client.

Any changes made to the defaults will only effect new users and won't effect the rates used for clients prior to the changes.

# Settings: Client Access Defaults

**Client Access Defaults** change what options are enabled during the initial setup of client access. Many of these settings can be personalized further for individual clients in the client access setup section.

**Client Access Permissions**

- Make Changes to Plans
- What-If
- View Planning Reports
- Allow Documents Modification

**Report Set**

Entire Report

**Invitation Email Message**

**Subject**  
Financial Planning Portal Invitation

**Body**  
Your advisor has sent an invitation to register for your financial planning portal.

**Welcome Page Message**  
Welcome to your financial planning portal.

**Alerts**

- Client Login - Alert me when a client logs in to client access
- Client Plan Changes - Alert me when client changes plan data in client access

**Open Client Access Signup**

- Enable Open Signups - Anyone with the below link will be able to sign up for client access

<https://awssilver.moneytree.com/Consumer/RegistrationNew.aspx?signup=4210f840-4eef-48bf-91b3-3695f68e8d08>

**Logo**

Choose File No file chosen Upload Image Clear Current Image

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# Settings: Compliance

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Clients Settings

**Personal Settings**

**Company Settings**

Asset Allocation

Cover Page

Cover Page Logo

Long Term Care

Report Customization

Budget Expense Items

Defaults

Integration

Client Access Defaults

Compliance

**Administration**

**Management Reports**

**Report Customization**

**Compliance Email**

Enter Compliance Email:

Enter the email address(es) of your compliance department. Separate multiple addresses using a comma.

A "Send for Review" button will be available when generating a report. The report will be sent to your compliance department.

Save Compliance Email

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

The screenshot displays the MoneyTree Administration interface. At the top left is the MoneyTree logo. On the right, there are buttons for 'Open Planner Questionnaire' and 'Logout'. Below the logo, there are tabs for 'Clients' and 'Settings'. The 'Settings' tab is active, and a sidebar on the left lists various settings categories: 'Personal Settings', 'Company Settings', 'Administration', 'Users', 'Roles', 'Password Policies', and 'Management Reports'. The 'Administration' category is selected, and the 'Users' sub-tab is active. The main content area contains a text block explaining that new user logins can be created here, with instructions on how to edit personal information, change passwords, and assign roles. Below this text is a 'Create User' button and a table of existing users.

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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: Users

The screenshot shows the MoneyTree administration interface. At the top left is the MoneyTree logo. On the right, there are buttons for 'Open Planner Questionnaire' and 'Logout'. Below the logo, there are tabs for 'Clients' and 'Settings'. The 'Settings' tab is active, and a sidebar on the left lists various settings categories: 'Personal Settings', 'Company Settings', 'Administration', 'Users', 'Roles', 'Password Policies', and 'Management Reports'. The 'Users' category is selected. The main content area contains instructions on how to create and manage users, followed by a 'Create User' button and a table of existing users.

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
	moneytree_sample@moneytree.com	John	Sample	CFP®	<input checked="" type="checkbox"/>	<input checked="" 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: Creating New Users

The screenshot displays the MoneyTree administration interface. At the top left is the MoneyTree logo. Below it, there are tabs for 'Clients' and 'Settings'. A sidebar on the left contains a menu with the following items: 'Personal Settings', 'Company Settings', 'Administration', 'Users', 'Roles', 'Password Policies', and 'Management Reports'. The 'Administration' section is currently selected. The main content area shows a notification: 'Your account allows 5 users to be created. To purchase more user accounts please contact sales at (877) 421-9815.' Below this is a form for creating a new user with the following fields: 'Email:', 'Password:', 'Confirm Password:', 'FirstName:', 'Last Name:', and 'Title:'. There are also two checkboxes: 'Active:' (checked) and 'Administrator:' (unchecked). A 'Create User' button is located at the bottom of the form.

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

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Open Planner Questionnaire Logout

Alerts Help Settings

Clients Settings

Personal Settings  
Company Settings  
Administration  
Users  
Roles  
Password Policies  
Management Reports

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	
CFP®	Full access	✕
Paraplanner	View/edit only	✕

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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: Editing Roles

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Clients Settings

Personal Settings  
Company Settings  
Administration  
Users  
Roles  
Password Policies  
Management Reports

Name: CFP®  
Description: Full access

**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.

Return to Roles

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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.

# Administration: Password Policies

The screenshot displays the Money Tree Administration interface. At the top left is the Money Tree logo. Below it, there are tabs for 'Clients' and 'Settings'. A sidebar on the left contains a menu with the following items: 'Personal Settings', 'Company Settings', 'Administration', 'Users', 'Roles', 'Password Policies', and 'Management Reports'. The 'Password Policies' section is active, showing three checkboxes: 'Require Password Reset' (unchecked), 'Require Two Factor Authentication' (unchecked), and 'Allow Password Reset Via Email' (checked). Below these is a 'Session timeout (5-60 minutes)' field with the value '60'. At the bottom of the interface, there is a copyright notice: '© 2020 Money Tree Software, Ltd. - All rights reserved v5.0.215.0 | Terms Of Use Licensed through 1/1/2025'.

Set the password policies for your company here.

Two factor authentication will send you a code to enter when you are logging into Advise, 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 Moneytree web application interface. At the top left is the Moneytree logo. Below it, there are two tabs: 'Clients' and 'Settings'. The 'Settings' tab is active. On the left side, there is a vertical navigation menu with the following items: 'Personal Settings', 'Company Settings', 'Administration', 'Management Reports', 'Groups', and 'Reports'. The 'Management Reports' item is highlighted. The main content area shows the 'Management Groups' section. It contains the following text: 'Management Groups: Advisors may be assigned to a manager to create a group.' Below this, there are three 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. At the bottom of the page, there is a copyright notice: '© 2020 Money Tree Software, Ltd. All rights reserved 10/10/2019 | Terms of Use Licensed through 1/1/2025'.

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

The screenshot shows the Money Tree software interface. At the top left is the Money Tree logo. Below it are two tabs: "Clients" and "Settings". A sidebar on the left contains a menu with the following items: "Personal Settings", "Company Settings", "Administration", "Management Reports", "Groups", and "Reports". The "Management Reports" section is active, and the "Groups" sub-section is highlighted. The main content area is titled "Create Management Group: Management groups allow reporting and analysis". It contains two steps: "Step 1) Select the Advisor who is the Manager for the group" and "Step 2) Add Advisors to the Management group". Step 1 includes a dropdown menu with the email address "moneytree\_sample@moneytree.com". Step 2 includes two lists: "Available Advisors" and "Assigned Advisors", with four buttons between them: ">", "<", ">>", and "<<". A "Return to Groups" button is located at the bottom left of the main content area. A green callout box on the right side of the interface contains the text: "Defining your management groups will allow for more specific report generation." At the bottom of the interface, there is a footer with the text: "© 2020 Money Tree Software, Ltd. - All rights reserved v5.0.215.0 | [Terms Of Use](#) Licensed through 1/1/2025".

# Management Reports: Reports

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Open Planner Questionnaire Logout

Alerts Help Settings

Clients Settings

Personal Settings  
Company Settings  
Administration  
Management Reports  
Groups  
Reports

**Management Reports:** Reports can be generated to show activity and assets under management.

**Select Report:**

- Activity Report
- Advisor Summary
- Advisor Detail

From: 7/5/2020 To: 8/5/2020

**Select Report Group:**

- Me
- All Advisors
- Managers
- Advisors

Generate Report

Select the scope of the report.

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 Advise 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.

## Need assistance? Contact our client support team.

 [moneytree.com/support-center](https://moneytree.com/support-center)

 877-421-9815

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