User Guide

Setup, Settings, & Administration

Moneytree Advise

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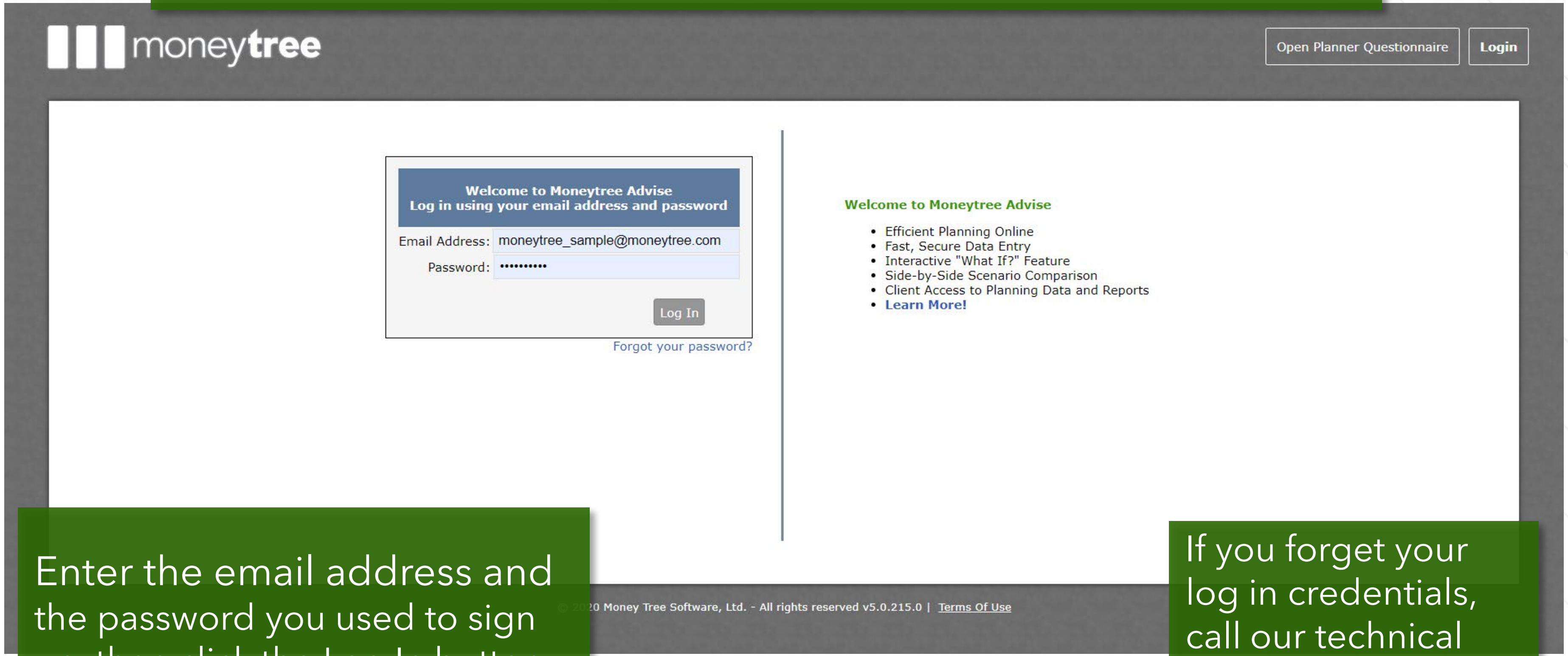
Logging In

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



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

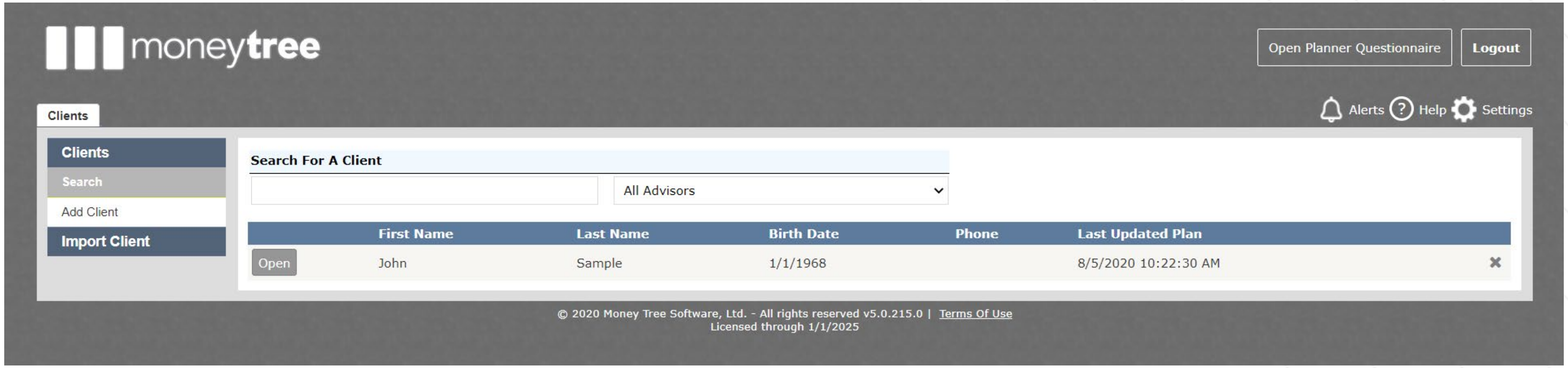
If you forget your log in credentials, call our technical support team for assistance.

Getting Started – Create or Open a Client

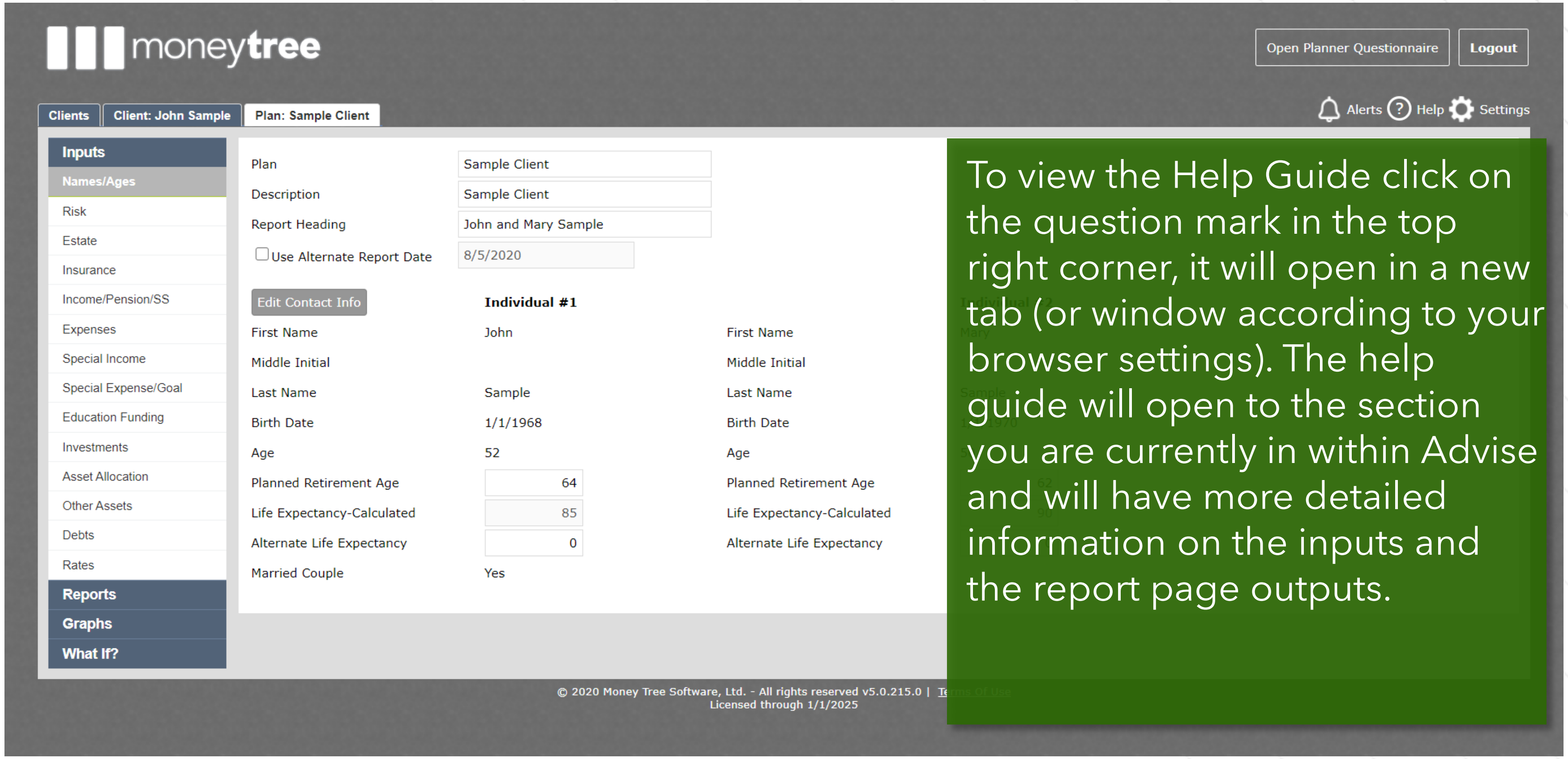
To get started:

- 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.

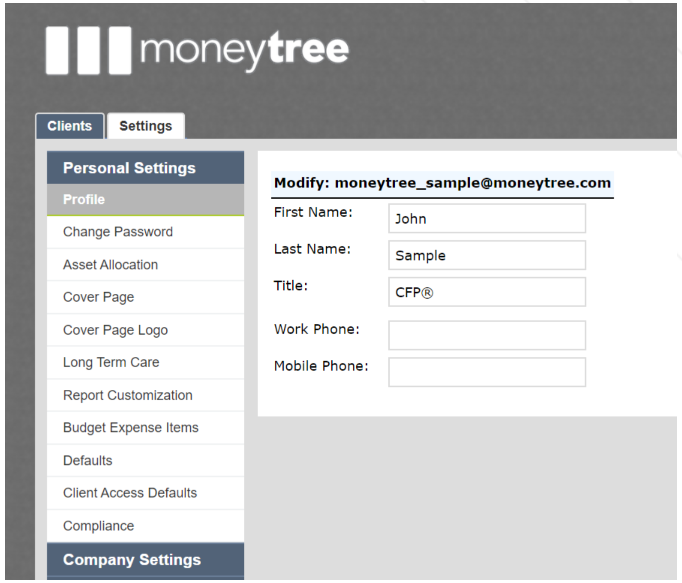


Online Help Guide



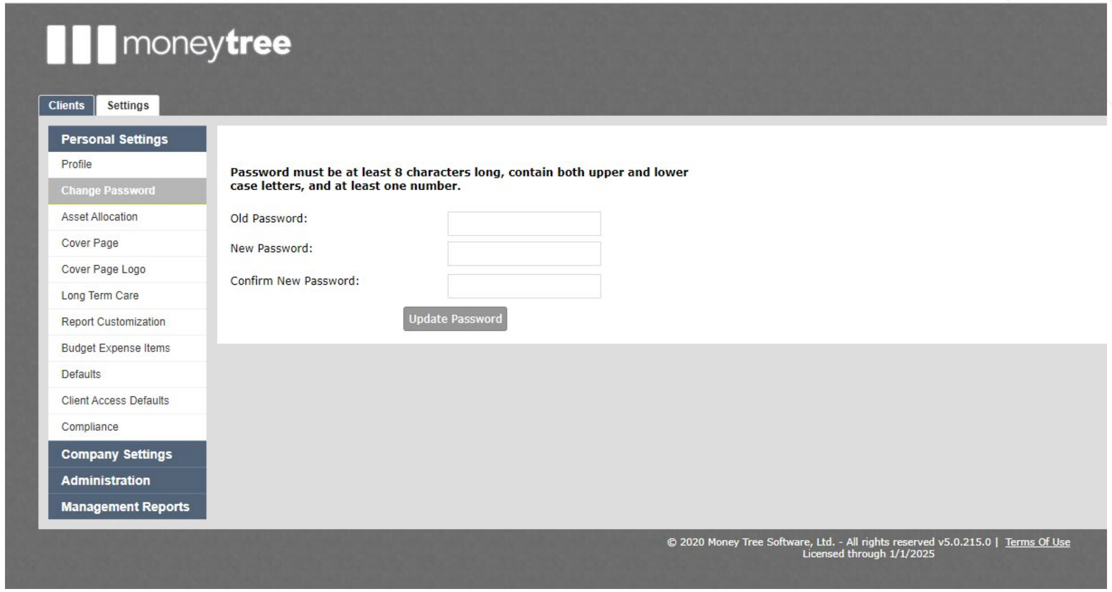
To view the Help Guide click on the question mark in the top right corner, it will open in a new tab (or window according to your browser settings). The help guide will open to the section you are currently in within Advise and will have more detailed information on the inputs and the report page outputs.

Settings: Profile & Change Password



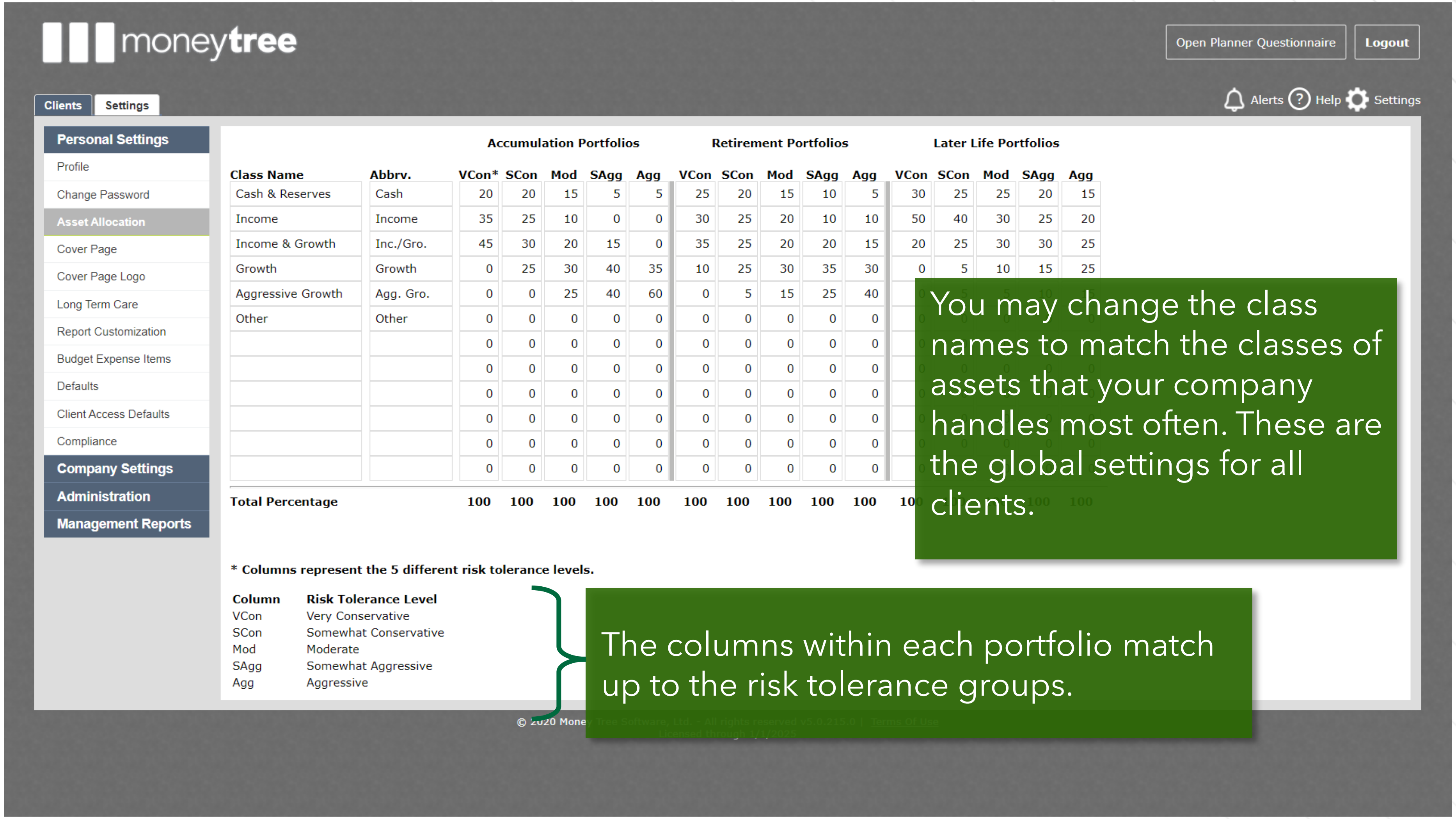
Profile: Edit the profile name, title, and contact numbers

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



Change Password: Update the password here

Settings: Asset Allocation



		Accumulation Portfolios					Retirement Portfolios					Later Life Portfolios				
Class Name	Abbrv.	VCon*	SCon	Mod	SAgg	Agg	VCon	SCon	Mod	SAgg	Agg	VCon	SCon	Mod	SAgg	Agg
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	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Other	Other	0	0	0	0	0	0	0	0	0	0	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
		0	0	0	0	0	0	0	0	0	0	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
		0	0	0	0	0	0	0	0	0	0	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
		0	0	0	0	0	0	0	0	0	0	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
		0	0	0	0	0	0	0	0	0	0	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
		0	0	0	0	0	0	0	0	0	0	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
		0	0	0	0	0	0	0	0	0	0	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Total Percentage		100	100	100	100	100	100	100	100	100	100	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

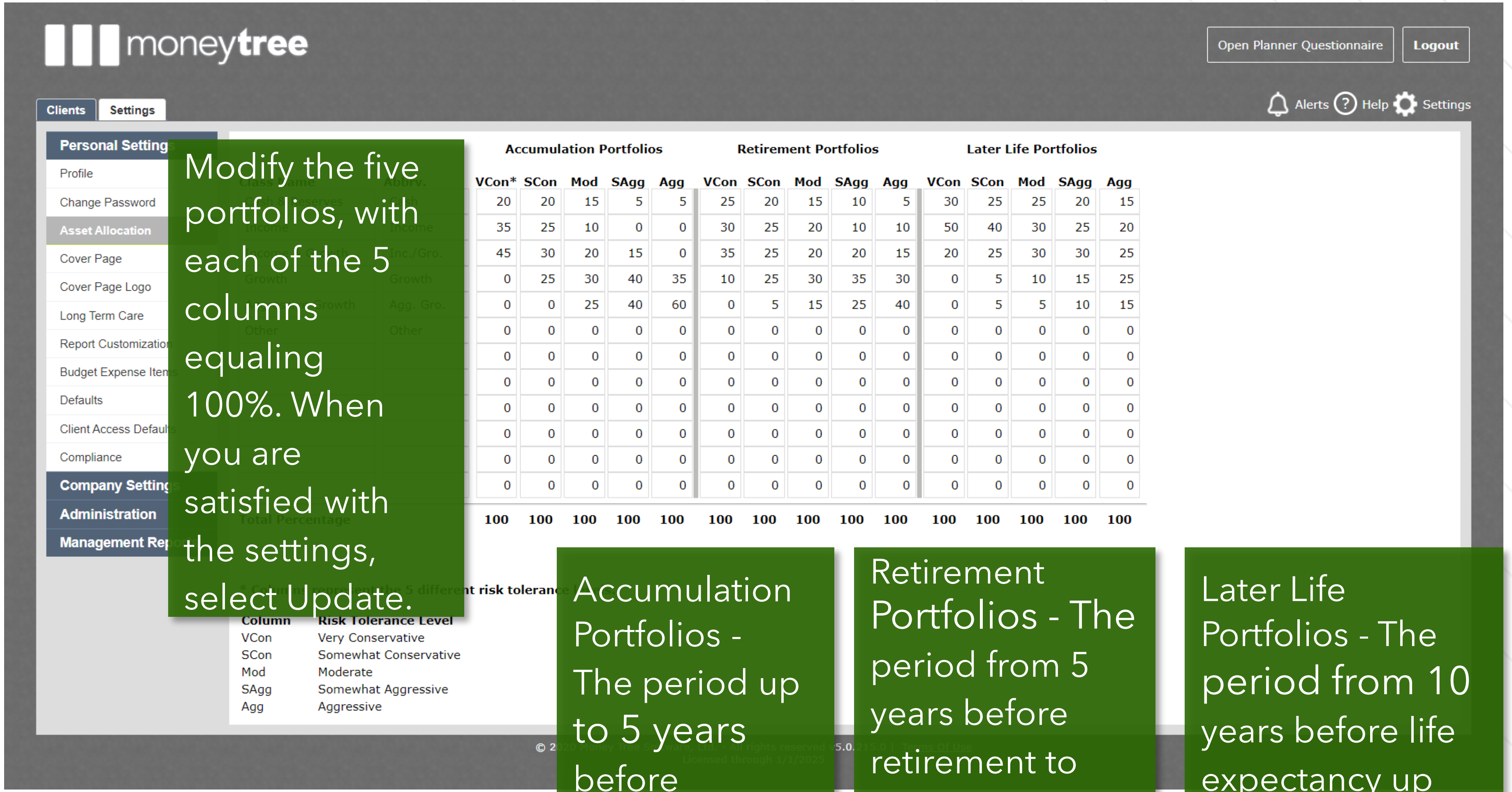
* Columns represent the 5 different risk tolerance levels.

Column	Risk Tolerance Level
VCon	Very Conservative
SCon	Somewhat Conservative
Mod	Moderate
SAgg	Somewhat Aggressive
Agg	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.

Settings: Asset Allocation



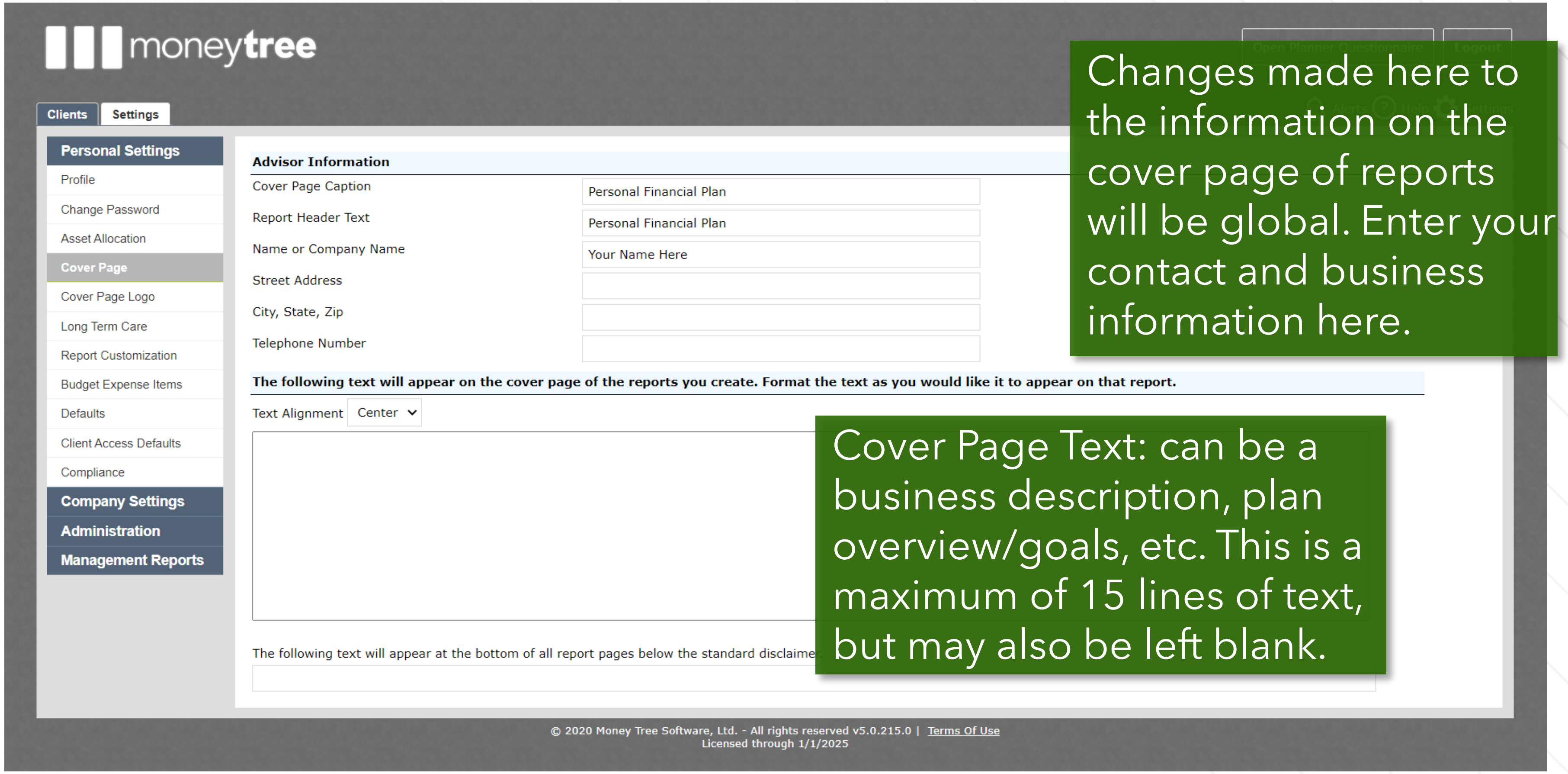
Modify the five portfolios, with each of the 5 columns equaling 100%. When you are satisfied with the settings, select Update.

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.

Settings: Cover Page



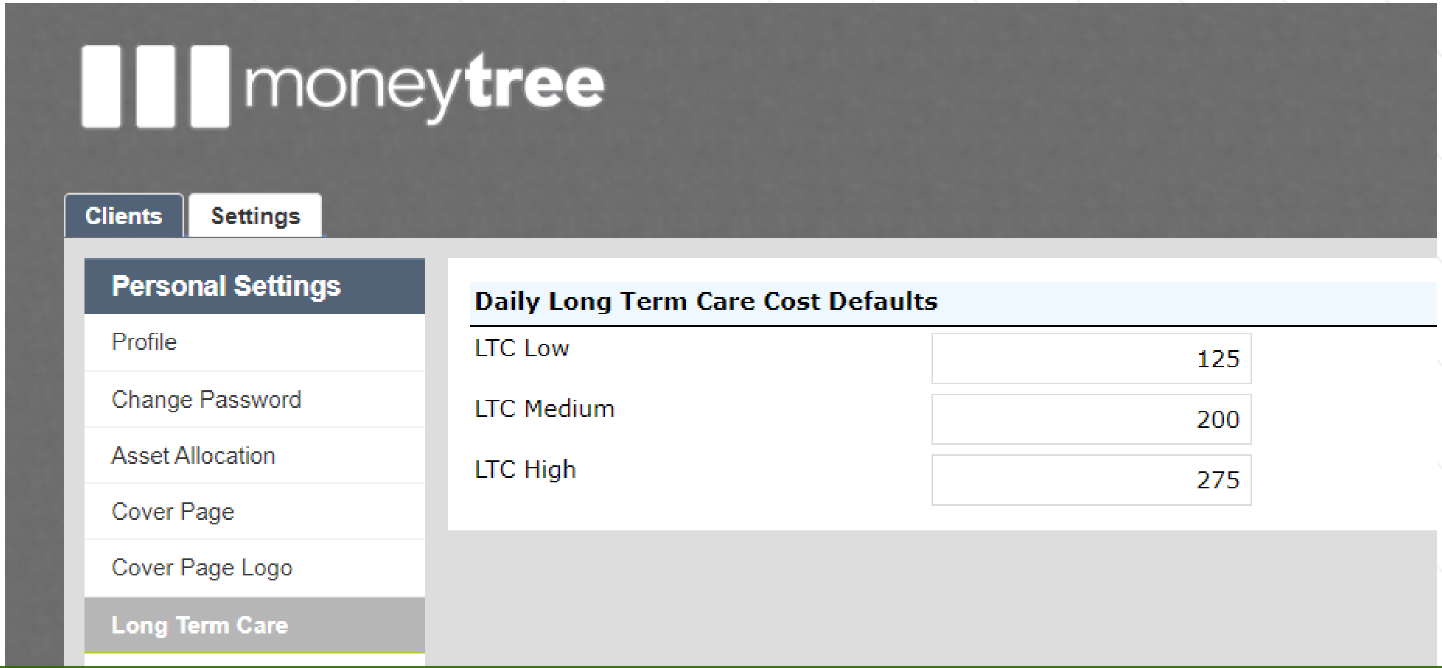
Changes made here to the information on the cover page of reports will be global. Enter your contact and business information here.

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.

Settings: Cover Page Logo

You can upload your company logo to appear on the cover page.
Use a .jpg image measuring 200x200 pixels approximately.

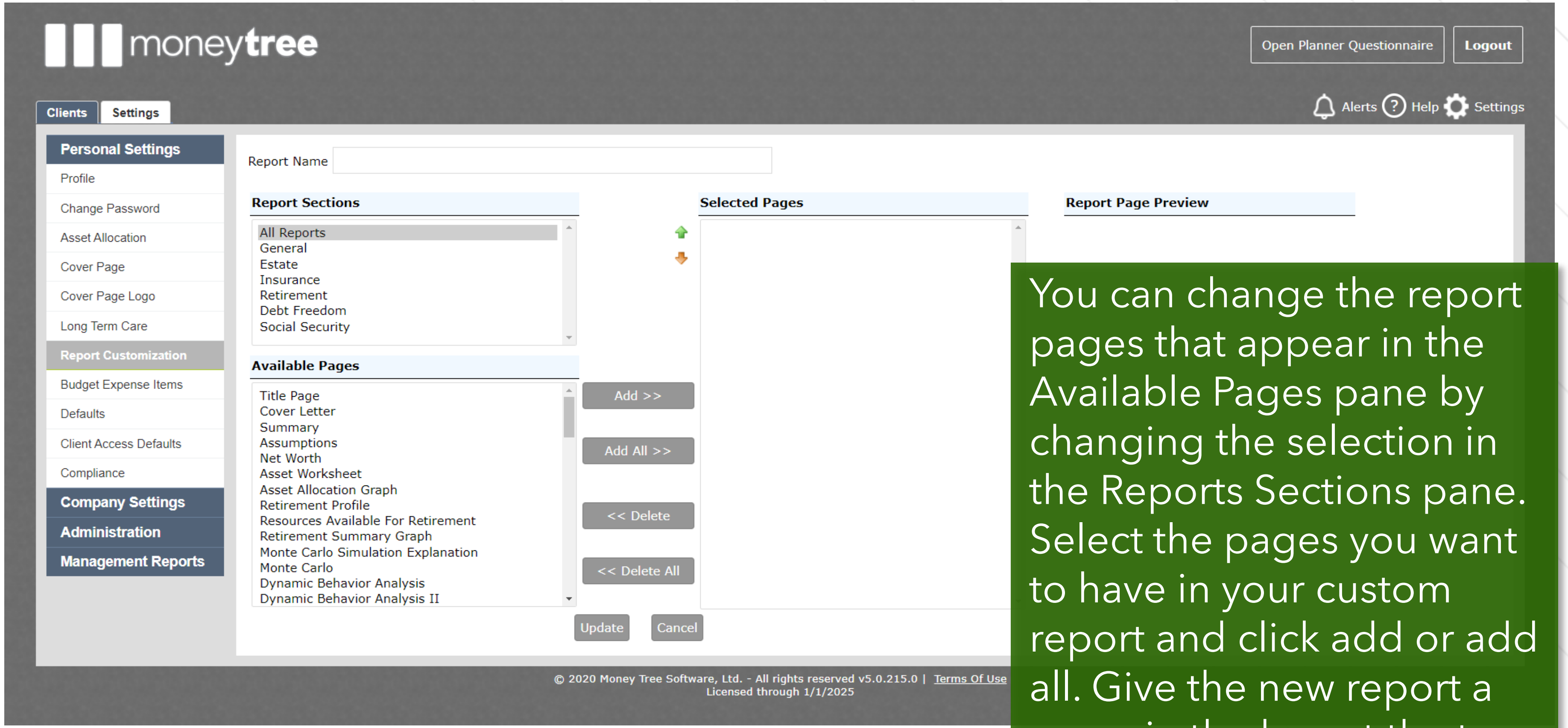
Settings: Long Term Care



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.

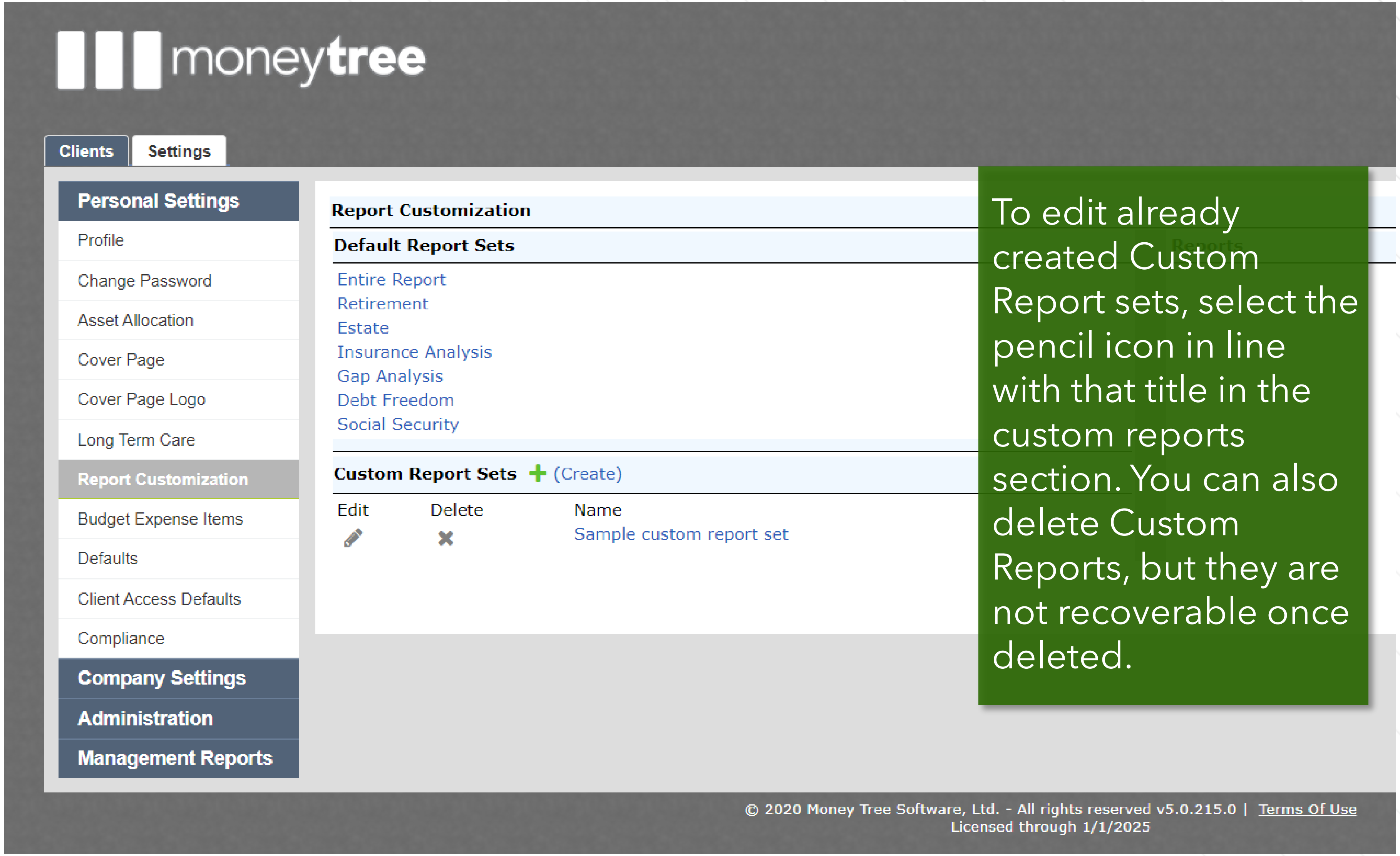
- Low represents $50,000 or less of the Annual Expenses During *Retirement from the Expenses input screen.*
- Medium will be $50,000 to $100,000 of the Annual Expenses During *Retirement from the Expenses input screen.*
- High represents more than $100,000 of the Annual Expenses During *Retirement from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

Settings: Report Customization



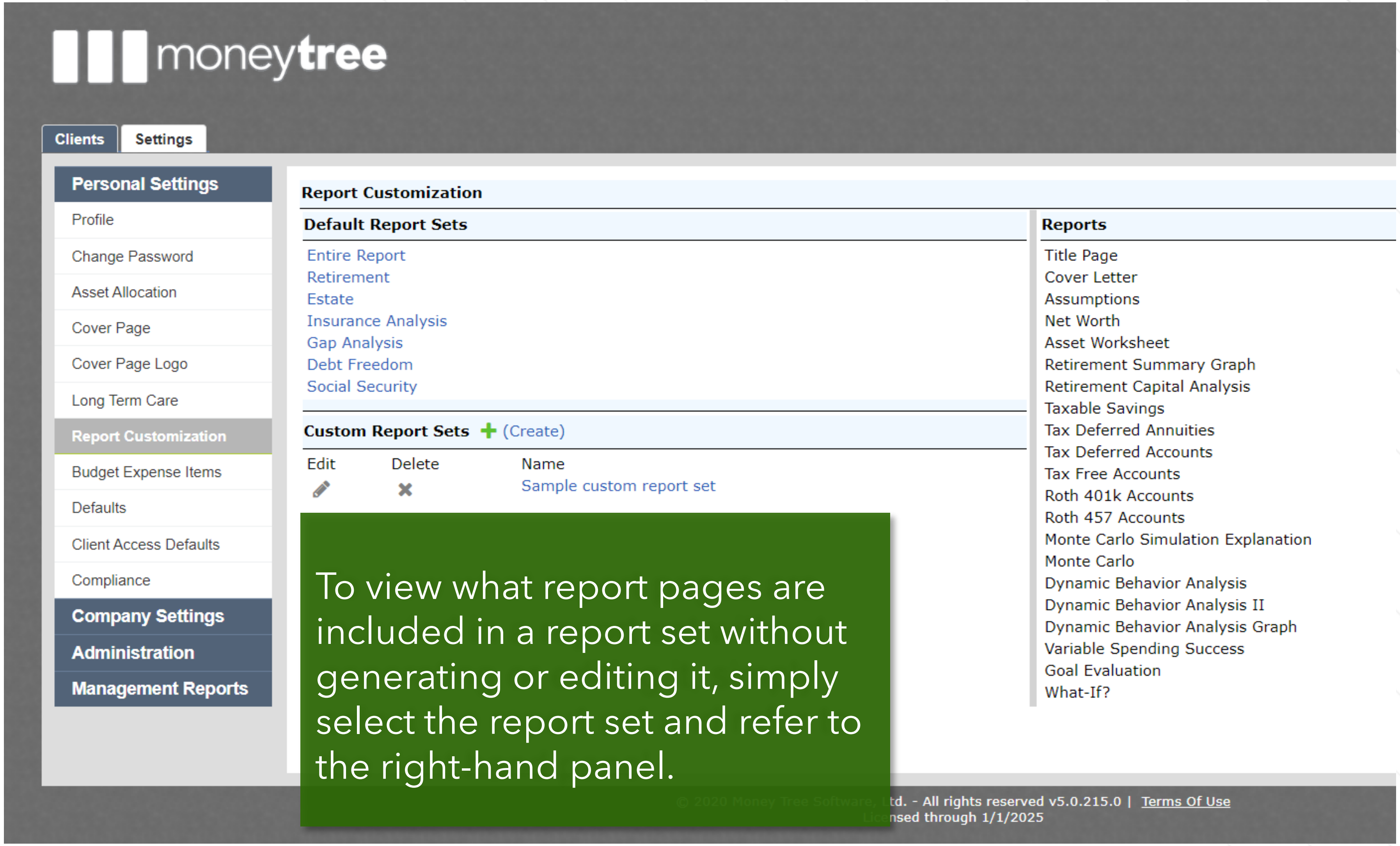
You can change the report pages that appear in the Available Pages pane by changing the selection in the Reports Sections pane. Select the pages you want to have in your custom report and click add or add all. Give the new report a name in the box at the top of the section, then select update.

Settings: 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.

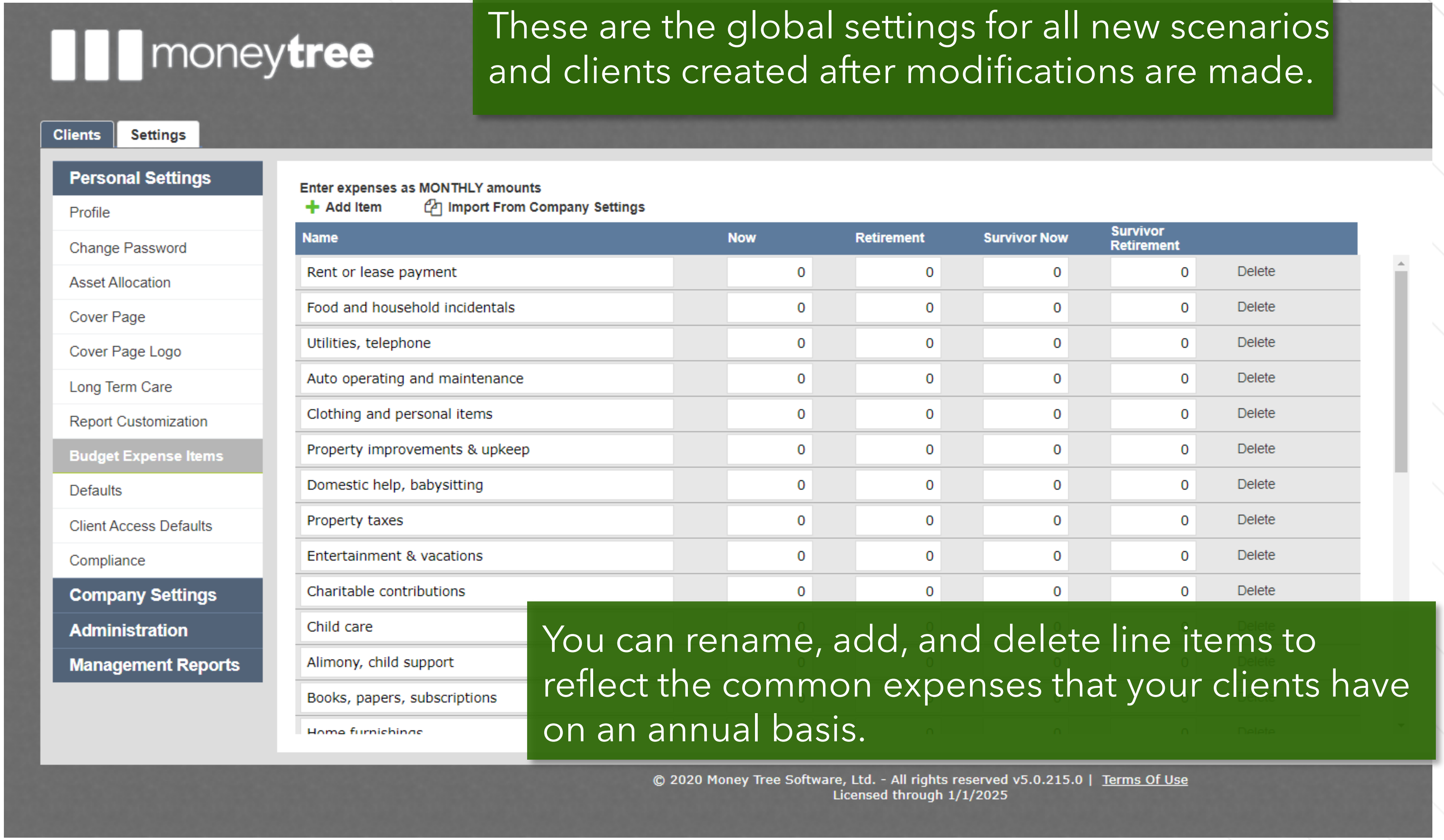
Settings: Report Customization



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.

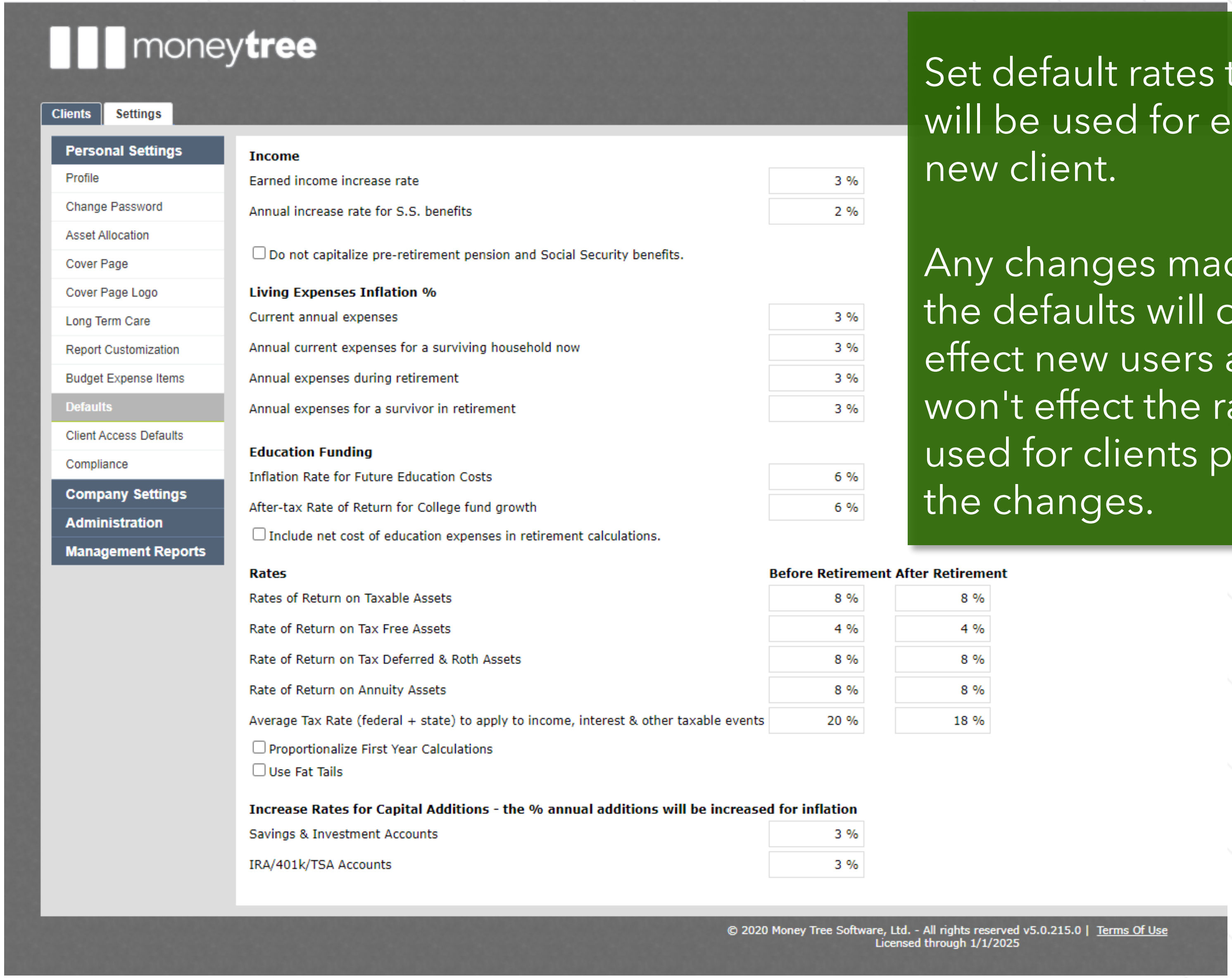
Settings: Budget Expense Items

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



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

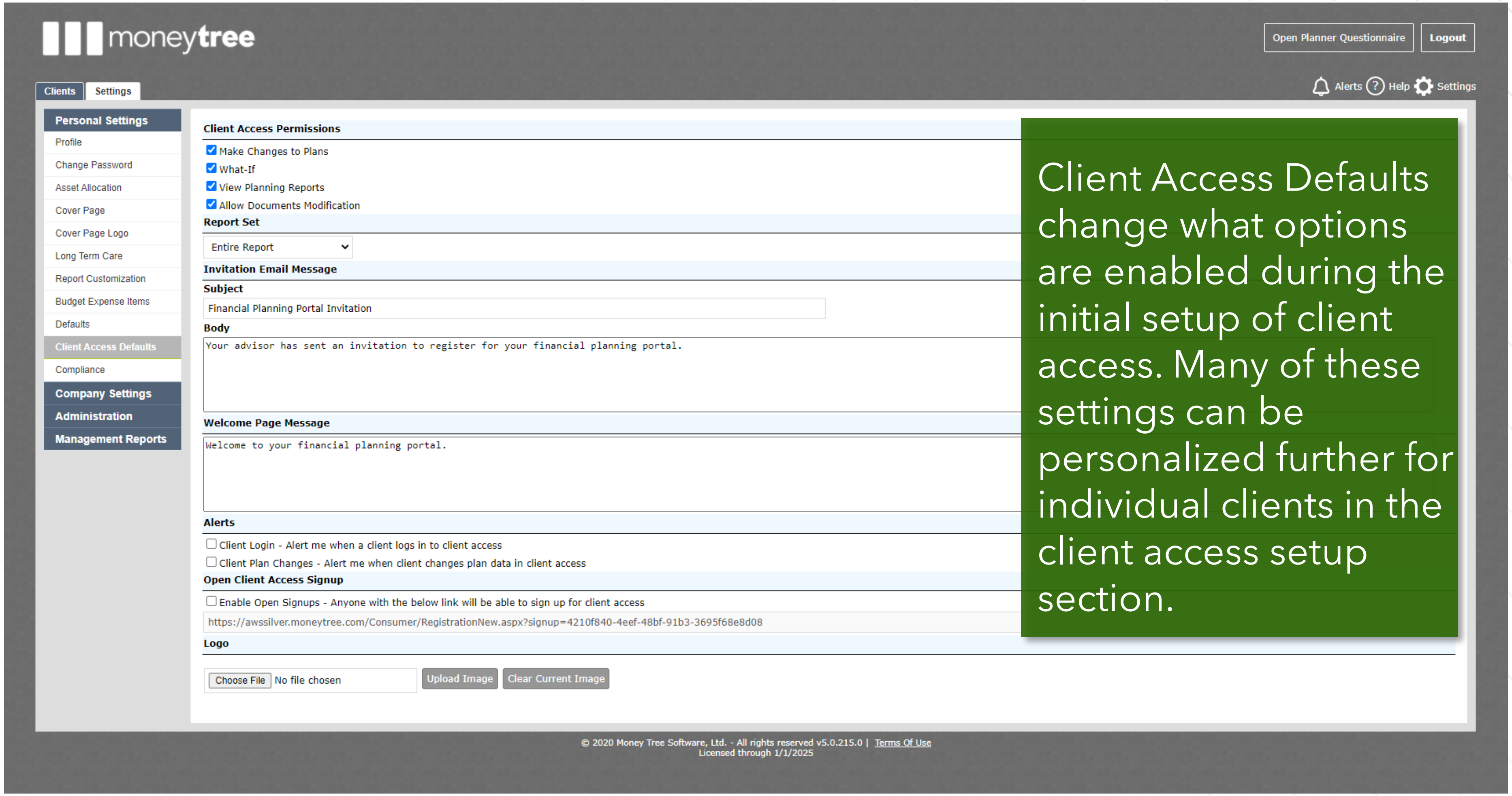
Settings: Defaults



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

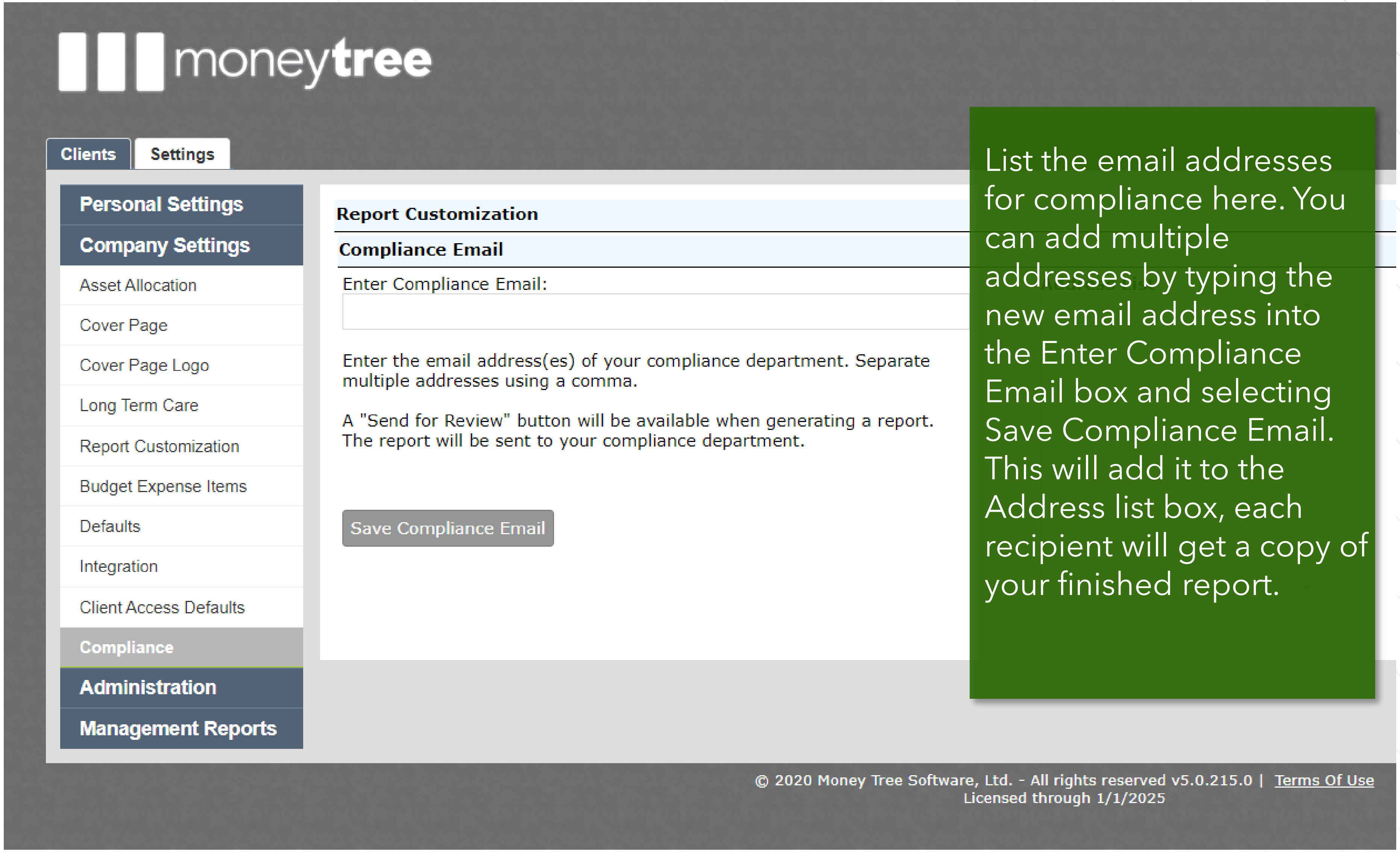
Any changes made to the defaults will only effect new users and won't effect the rates used for clients prior to the changes.

Settings: Client Access Defaults



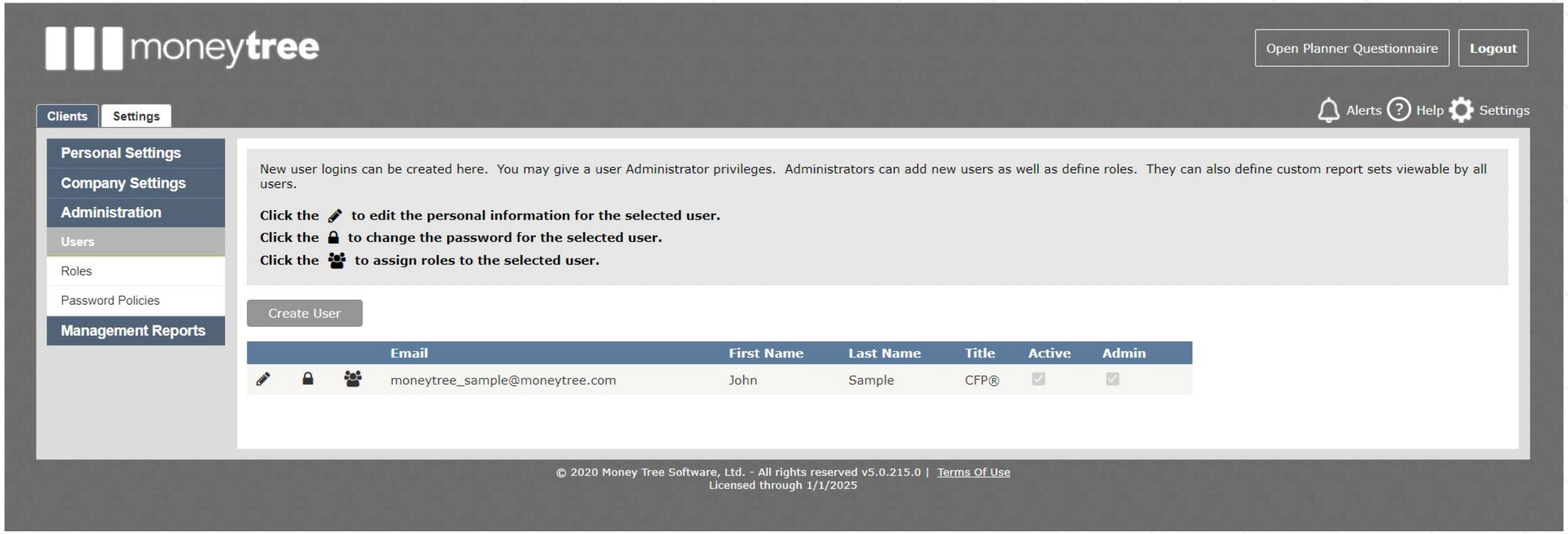
Client Access Defaults change what options are enabled during the initial setup of client access. Many of these settings can be personalized further for individual clients in the client access setup section.

Settings: Compliance



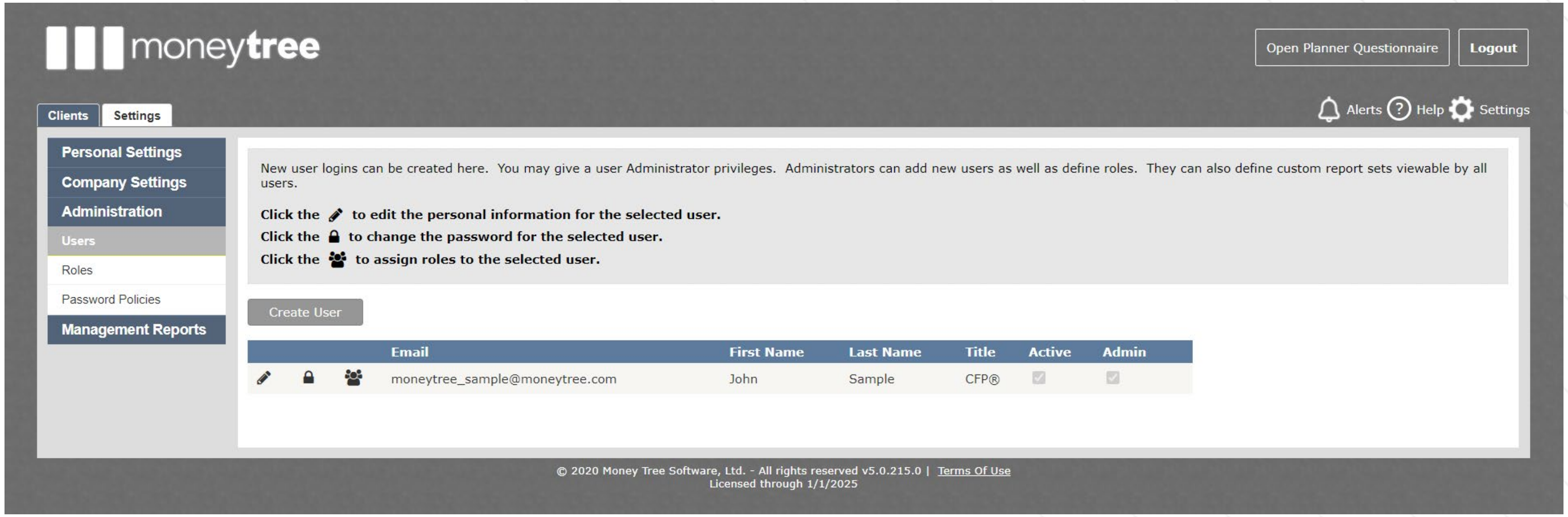
List the email addresses for compliance here. You can add multiple addresses by typing the new email address into the Enter Compliance Email box and selecting Save Compliance Email. This will add it to the Address list box, each recipient will get a copy of your finished report.

Administration



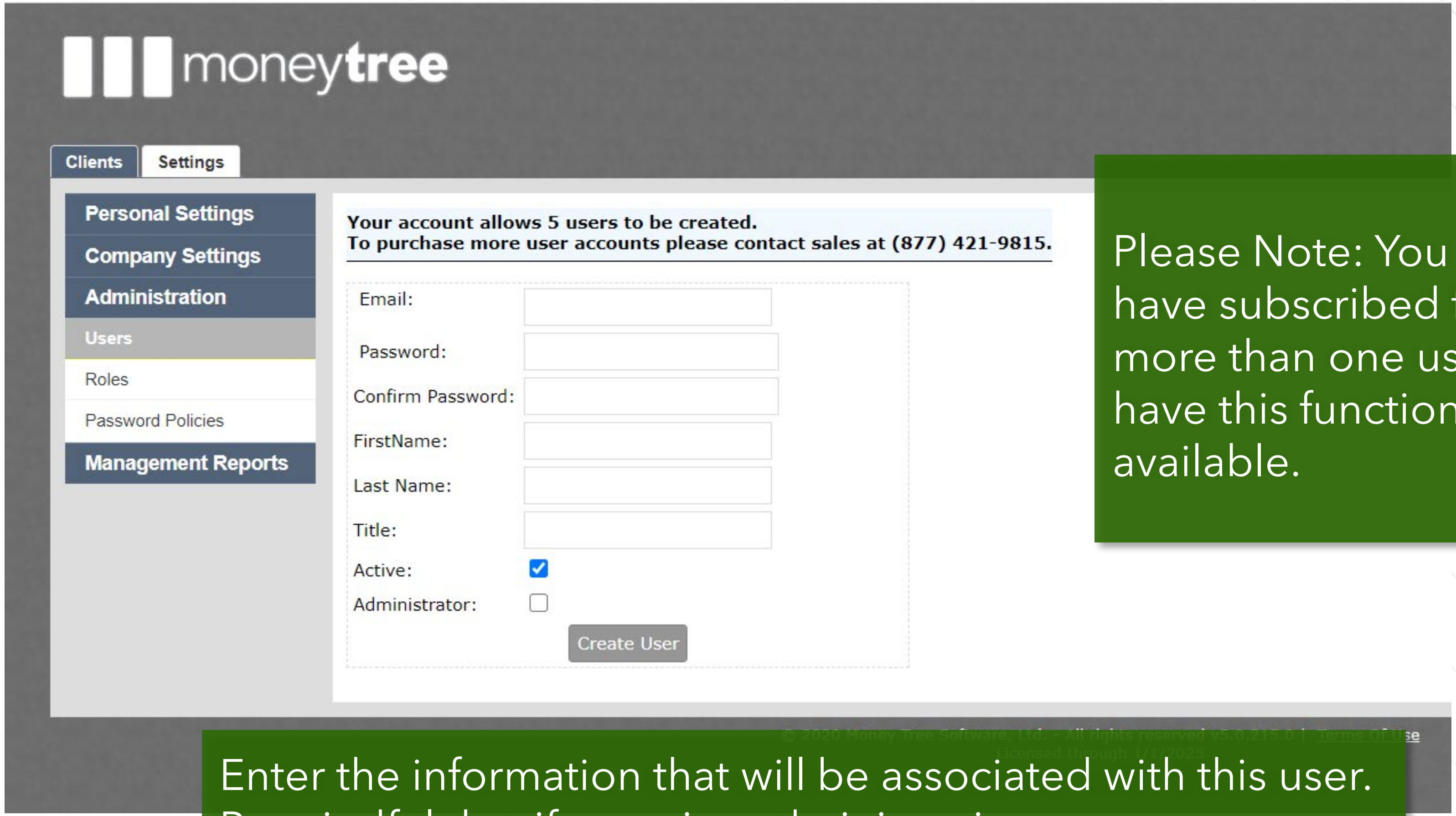
If you are an administrator on the account, the Administration tab will allow you to make changes to the roles and permissions for users, along with the defaults and settings for the account.

Administration: Users



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.

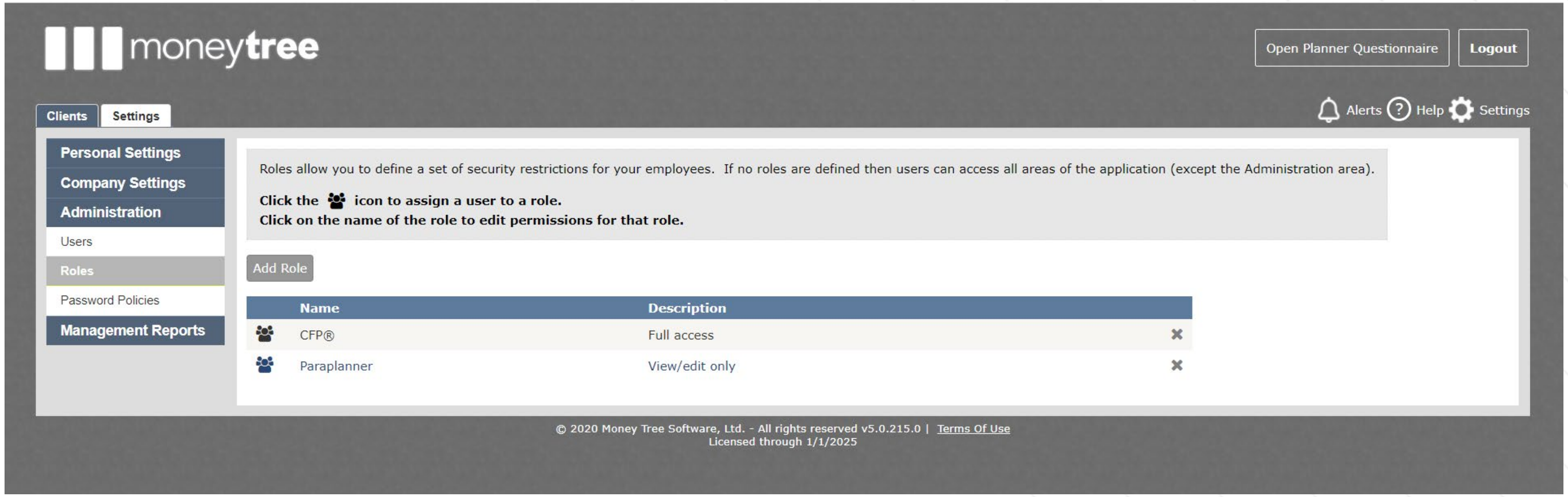
Administration: Creating New Users



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

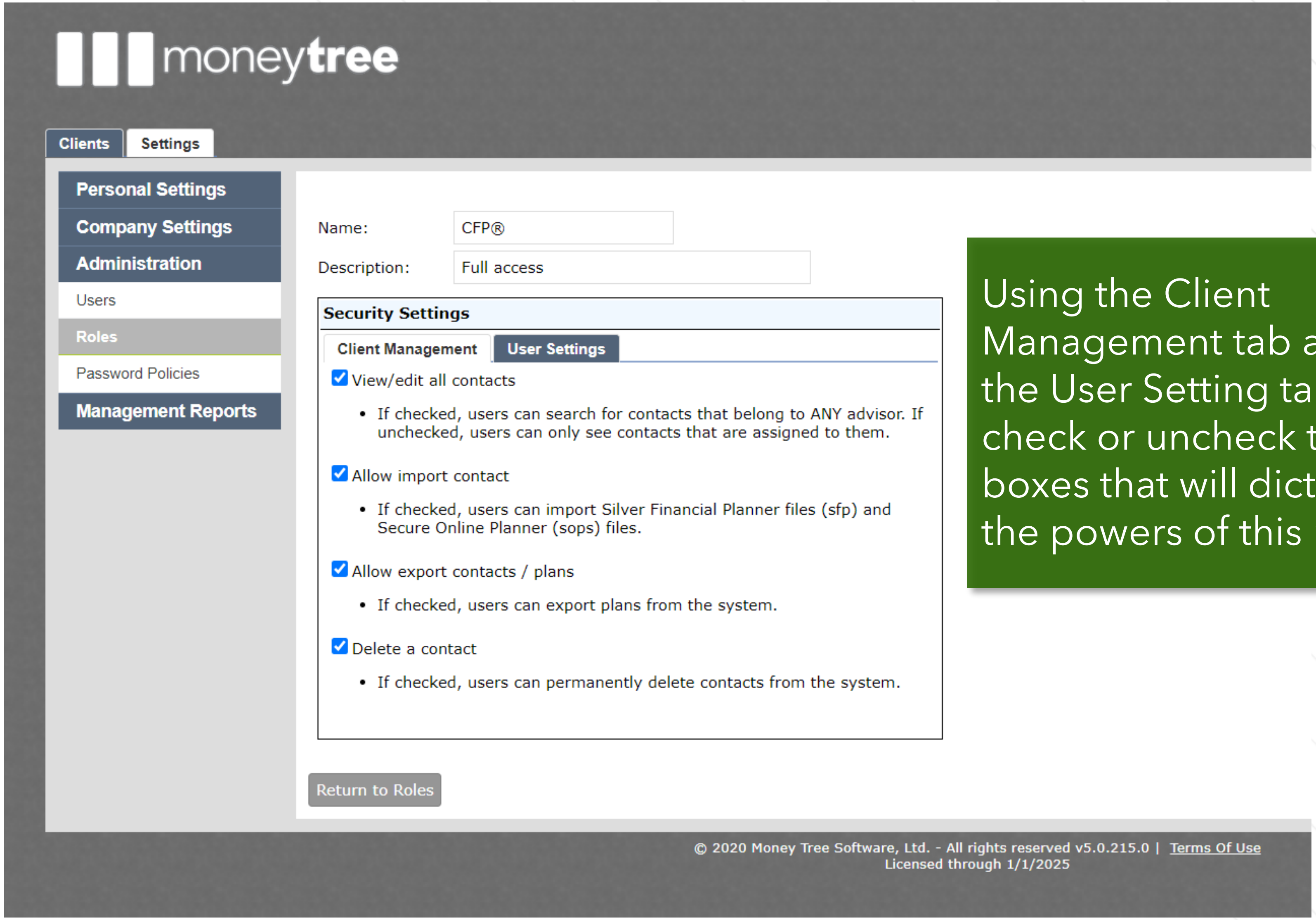
Enter the information that will be associated with this user. Be mindful that if you give administrative powers to a user they will have the same abilities that you have as the account administrator. When finished, select Create User.

Administration: Roles



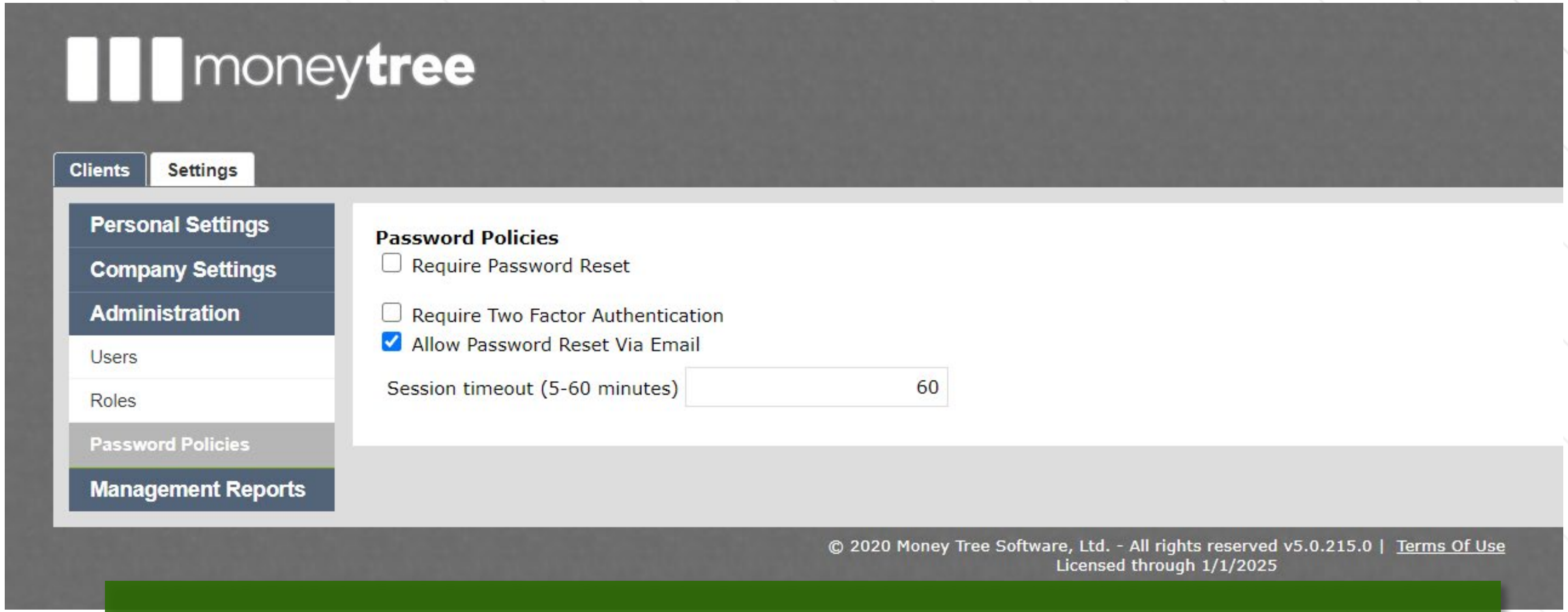
You can create and assign roles here, roles dictate the permissions that different user types can wield. To create a role, select the Add Role button. To assign a role to a particular user, select the role from the list and follow the instructions on the next slide.

Administration: Editing Roles



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



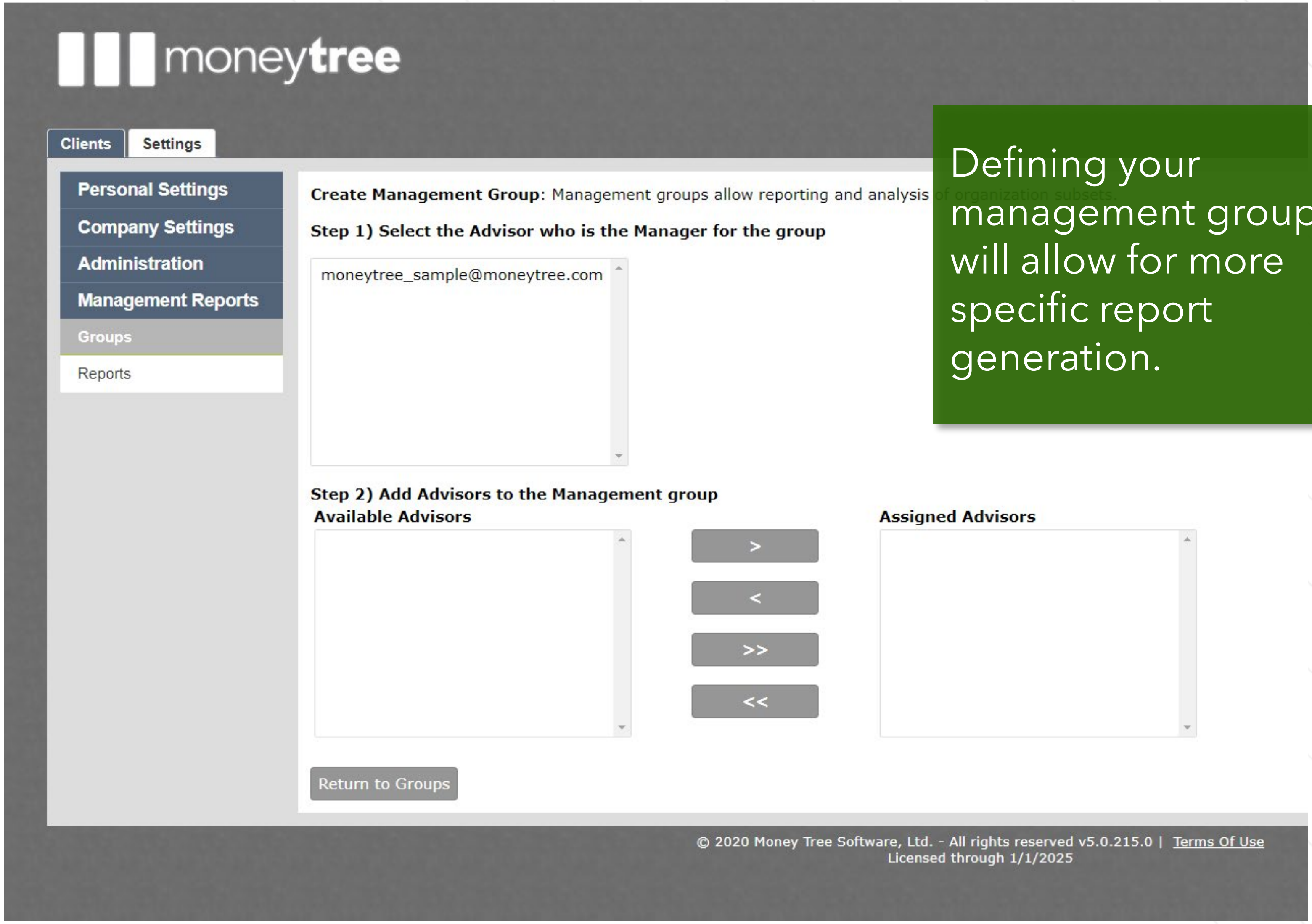
Set the password policies for your company here.

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

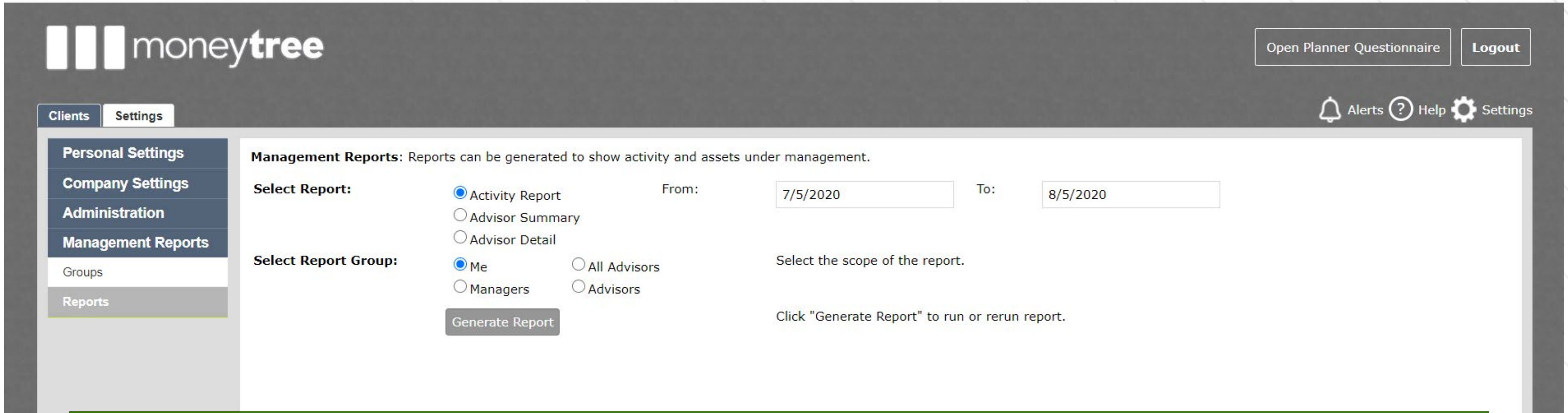
For management reporting, management groups can be created. Advisors can be set as managers of a group. Any advisors not set as managers are available to be included under the management groups. Management reports can be run for each manager, which includes any advisors that are part of that managers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

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moneytree.com/support-center

877-421-9815

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