PRODUCT OVERVIEW

Advisys and NUCO bring together research and technical materials as well as client-ready presentations on the following topics:

HEALTH/MEDICAL

Topics covered include: Medicare benefits, qualification, coverage and eligibility, Health Insurance (including policies, health care reforms, supplements, HSAs, HDHP and critical illness insurance), Medi-gap coverage, Long-Term Care policies, Disability Insurance plans and needs, Taxation issues relating to health care, Reverse Mortgages, as well as coverage of end-of-life decision making.

INVESTMENT/TAXES

Topics covered include: ~~Investment Planning and Objectives~~ (including goals, concepts, risk tolerance, asset allocation and market tools), discussion of investment vehicles such as various types of bonds, stocks, annuities, mutual funds and other securities, as well as ~~the types of~~ taxes and their impact.

INCOME SOURCES

Topics covered include: retirement needs analysis (planning, life expectancy, early retirement), retirement income sources i~~ncluding Social Security~~ (including strategies to maximize benefits) annuities and other funding, and retirement distribution processes and methods.

PROTECTING FINANCES

Topics covered include: life insurance products including the amount of coverage needed, the types of life insurance as well as business planning issues including succession planning, key employee coverage, buy-sell agreements and disability coverage.

INDUSTRY NEWS

CURRENT DEVELOPMENTS

QUICK TIPS - NAVIGATION

COMMAND BAR

At the top of the NUAnswers page, you can select the following:

FILE: Allows the option of controlling client information including creation of new client records, viewing existing clients, and saving or printing client information

TOOLS: Enables the ability to set or modify default information such as company information, presentation defaults, disclaimers, disclosures, profiles, print options and passwords

HELP: Provides links to detailed online help, support, license information and suggestions

LOGOUT: Enables you to end your session

SIDEBAR: The SIDEBAR commands on the left column allow you to create, view, modify or save client information as well as to print presentations or save them to PDF

SEARCH

When using the **SEARCH** function – Select "Search" and then a specific TOPIC or ALL from the dropdown. Enter your search term or phase. You can limit your search to document titles if desired.

FAVORITES

The **FAVORITES** option allows you to easy access saved Reports or Templates for future use or display.

CLIENT PRESENTION

The **CLIENT PRESENTATION** option allows you to identify and select reports that you wish to ~~have in all presentations.~~ Unless unselected, these reports will be in any Presentations created.

PRESENTATION

PRESENTATION CONTENTS: Enables you to easily tailor presentations to the needs of your client or audience. Customize your presentation by deciding what to include in the Presentation Contents - such as Table of Contents, Personal Profile, Title Page, as well as Disclosure and Disclaimer information

CLIENT INFORMATION: Allows inclusion of information specific to your client can be added to the Client Information page

TITLE PAGE: Enables custom templates for each client or type of report