NUAnswers Startup Guide

Welcome to NUAnswers. Our goal is to help you provide second to none materials to your clients and prospects.

This document will walk you through using NUAnswers from initial setup to creating a presentation for your clients or prospects.

Product Overview

First, what are the ways in which you can use NUAnswers? NUAnswers combines client educational concepts from Advisys and National Underwriter. NUAnswers helps you at every stage of the client development life cycle.

NUAnswers includes client education and presentation materials on all of the important financial planning topics, investments, life insurance, annuities and other products. They meet FINRA guidelines and are written in everyday language average Americans can understand.

For example, they can be used to create an approach piece, or as seminar handouts. They can be used for first appointments, or leave behinds when prospecting for new business. They can be used to help service existing clients. Or for a quarterly or annual review of your clients goals. Best of all, any of these reports can be combined into a single presentation just by clicking on the check box next to the title. It's just that easy to create a completely personalized client presentation.

We'll discuss these features in more detail later.

Setting Your Preferences

The first step is to setup NUAnswers preferences. This involves add your company information, adding or editing the disclosure and disclaimer provided by NUAnswers, and adding your Personal Profile page. The entire process to set up your preferences takes 10-15 minutes.

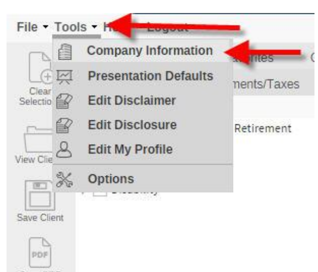
To prepare to set up your preferences you'll need:

- Your title and designations
- Your company name and address, contact information and website address
- Your company logo (available either on your computer hard drive or accessible on your computer network)
- A photo of you (if you wish to include a Personal Profile page with your picture)

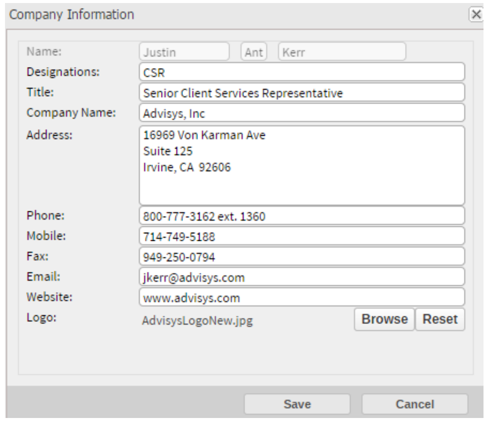
Company Information

The company information is used to populate the Title Page with your information.

This is how to enter this information



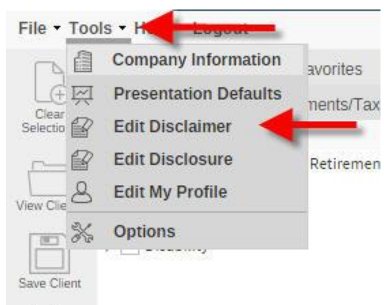
Open the Company Information screen by selecting Tools and then Company Information.



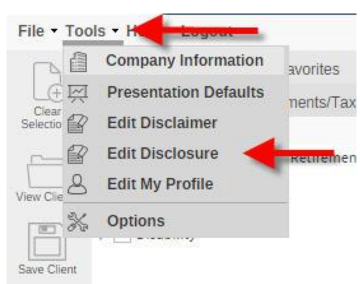
This is where you enter the information about you; what designations you hold, title, company name and address and contact information. If you have a website, enter that here also. Add your logo by selecting Browse and then navigate to your website. Select Save. All of this information will now appear on the Title Page, which will be further discussed as part of building a presentation.

Disclaimer and Disclosure

The next step in getting the tool matched to your needs is to review and edit the disclaimer and disclosure, if necessary.

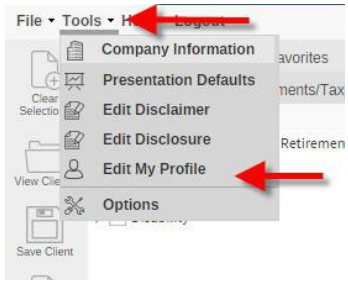


NUAnswers provides a basic disclaimer. The purpose for the disclaimer is to let the client know that these reports are not guarantees of future performance and should not be relied on solely when making financial decisions. Modify this to meet your compliance needs, then select Save.

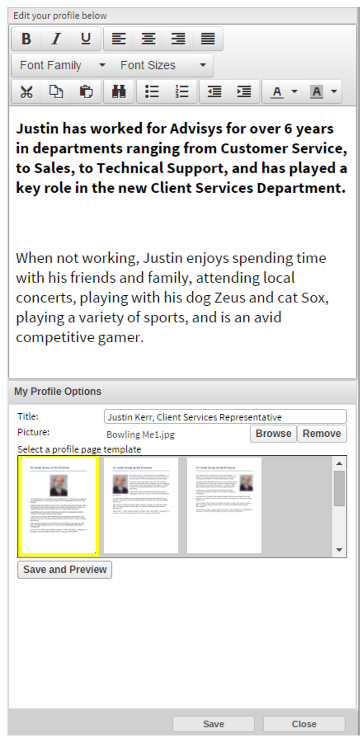


NUAnswers also provides a basic disclosure. The purpose for the disclosure is to let the client know the companies that you might be representing and the appropriate disclosure information regarding those companies. Modify this to meet your compliance needs, then select Save.

Personal Profile

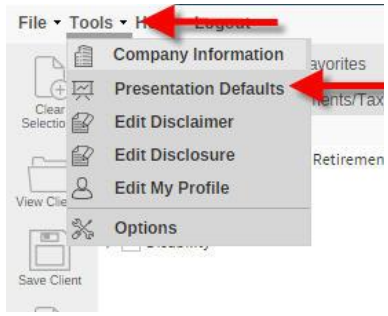


The Personal Profile page is intended for you to let your clients and prospects know about you and your firm. This is intended to be a brief biography about you and a brief history about your firm and the services offered. It is not mandatory that you include a Personal Profile page. If you don't wish to include a Personal Profile page, or if you want to create it later, you can skip this step.

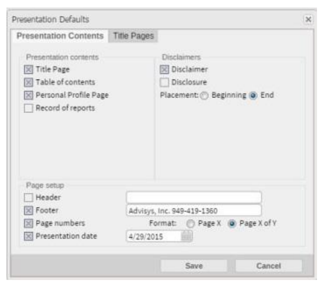


Start by creating the content for this report. Be sure to include relevant information about you and your background and some basic information about your firm. Next enter a title for the report. Add a picture of you or your firm by selecting Browse and navigate to the desired image. Finally, select a layout. The layout determines the location of a picture if any; either in the center, left or right, or not at all. Click on Save and the Profile report is ready to include in a presentation.

Presentation Defaults



The next step is to select the presentation defaults. A presentation is a collection of reports, about one or multiple topics, that you wish to bundle into one complete package to present to your clients or prospects. By selecting the defaults to be contained in a presentation, you don't have to do it each time you create a new presentation. The questions you have to answer are:



Do you want to include the following in most of your presentations:

- Title page
- Table of contents
- Personal Profile Page
- Disclaimer and/or a disclaimer
- Record of reports?

Do you want a header on each page, such as the client's name?

Do you want a footer on each page, such as your phone number or company name?

Some people put the clients name as the footer. There is no correct answer, only your preference.

Do you wish to include page numbers? If so, do you wish to include just page numbers on each page, or include the total number of pages in the presentation on each page too? In many cases, compliance prefers that presentations also include the total number of pages on each page. This is so it is easy to see when a page is missing.

Select save and you have completed all defaults for building a presentation.

Basic Navigation

This section will explain the some of the basic navigation and features of NUAnswers and conclude with building a presentation

This is the Home Screen, it is what you will see each time you log into the product.

Along the left are quick navigation icons. Across the top is the menu bar. These will both be covered a little later in the document.

The links below the menu bar are ways to find the reports that you want to view, print or add to a presentation.

Starting on the Health/Medical you can see all of the reports that are contained in the NUAnswers product that deal with Health and Medical related topics. To Open the folder, simply click on the title of the folder that you wish to open. You will then see a list of reports displayed featuring either the Advisys Logo, or the National Underwriter Logo. This is to easily identify which content is which.

The next topic, Investments/Taxes contains reports related to investments, as well as taxes. This would allow you to easily educate your client on the different types of investments they may want or need to include in their overall portfolio.

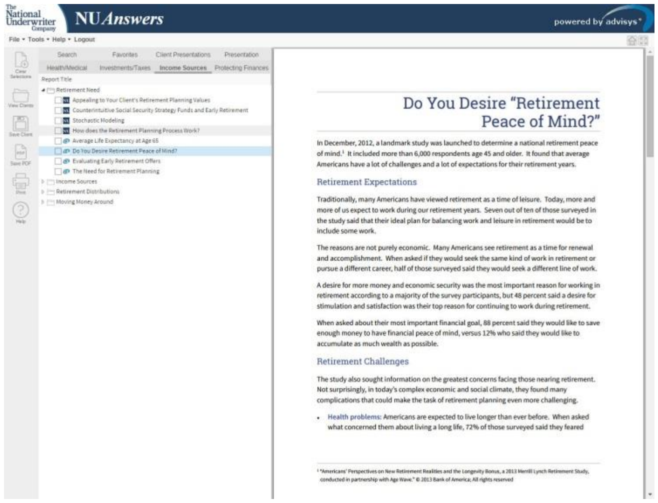
The third topic, Income Sources, contains material that covers a variety of different income sources that a client or prospect may need to know for Retirement purposes.

The final tab is Protecting Finances, this is where you can find reports on Life Insurance as well as Business Succession planning.

Clicking on the arrow next to the topic, opens the folder. Also, clicking on the title of the folder will open it as well.

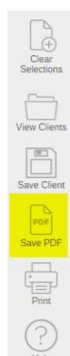
Click on the arrow in a sub folder shows the available reports.

To see the report, click on the report title. The report displays on the right side of the screen. Anytime that you click on a report title, the report will display on the right side of the screen.



You can print this report by clicking on the Print icon on the left

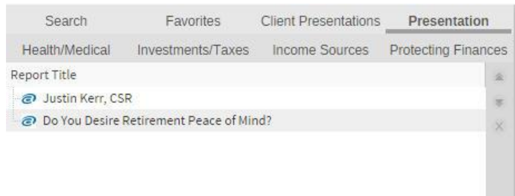
You can also save this report as a pdf file by clicking on the Save pdf icon.



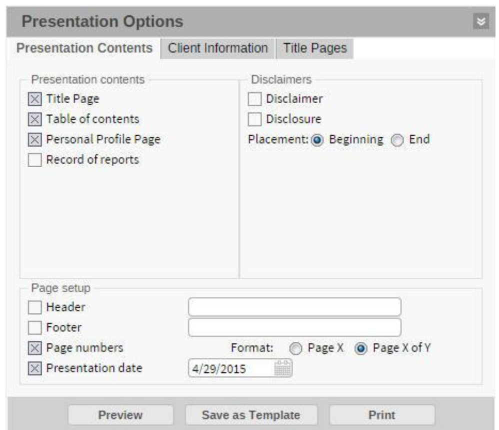
You can open the pdf file at a later time for printing or to email it to a client or prospect. When the report is saved or printed, NUAnswers will use the layout options that you entered in the Presentation default screen under Tools

To combine several reports into one presentation, check the box next to the report that you want included.

Finish the Presentation



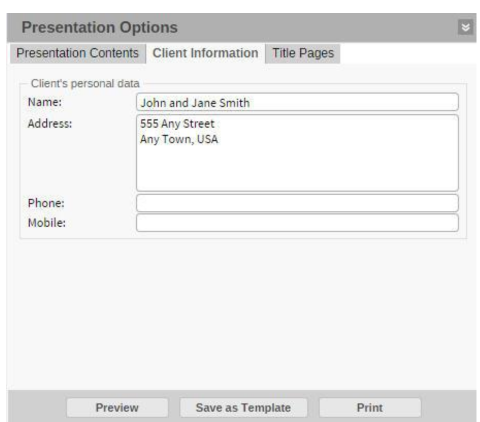
You can see the report that we have selected for the client. Since I elected to include the Personal Profile Page in the Presentation Defaults under the Tools menu, that report is also included.



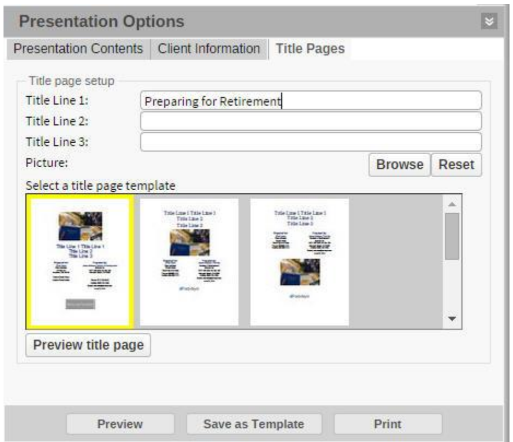
You can see the presentation options have all been selected based on the defaults that were setup earlier. You can change the selections for this client on this screen and still retain your defaults for all future clients.

One suggestion is to add the client names on the header.

Now enter the client name and address. They will appear on the title page.



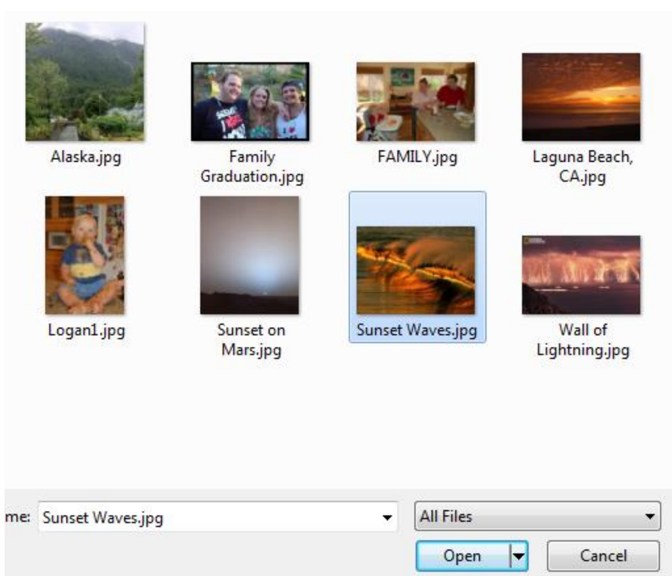
The last step is to add a title and select the format of the title Page.



The title for this will be Preparing for Retirement

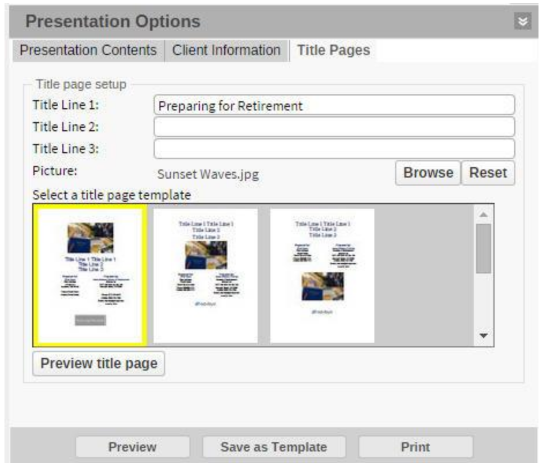
Select the page template, the only difference is the location of the picture; top, middle, bottom or none

The last step is to add a picture that is relevant to your client. To do this, you will want to have stock photos available to you that you can access on your hard drive or on your computer network. Or you can take a photo of something using your cell phone or digital camera and save it to your computer hard drive or network to add to your presentation.



Select the picture to add and select Open

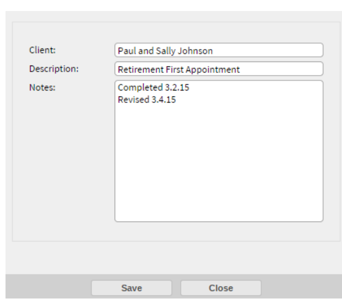
The presentation is now complete



It is recommended that you preview the presentation before printing or saving as a pdf file.

To save the client you are working on, click the save client icon.

You will be prompted for a Client Name, Description and any notes that you may want to save with the client file.



Click on Save

Now you are ready to print or save the presentation as a pdf file. Just click on the Print or Save PDF icons

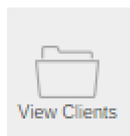
Left Navigation Bar

When you sign into the NUAnswers product this is what you will see. This portion of the document will focus on the left navigation bar.

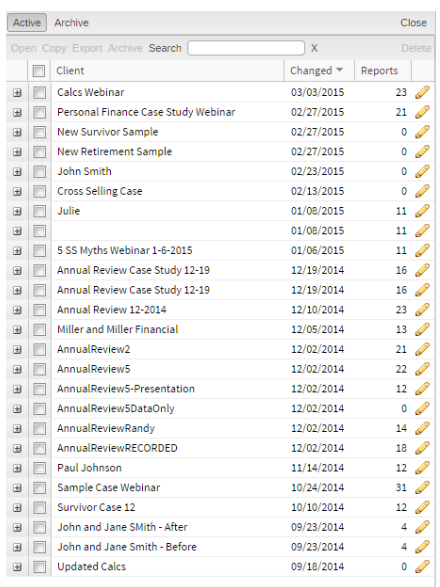
The first icon is Clear Selections

Click on this when you want to erase all data and report selections and start fresh. When you click on this, it appears that nothing happens because all that happens is the data that you have entered is erased from memory, but not erased from the saved files.

The next icon is the View Clients.

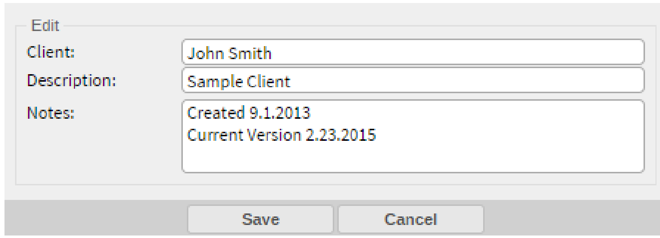


When you click on this, you will see a list of all of your saved client files. You can sort the files by clicking on the column headings. To find the most recent client that you saved, click on the arrow in the Changed column and select descending.

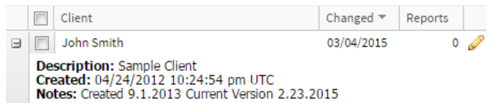


Client	Changed	Reports
Calcs Webinar	03/03/2015	23
Personal Finance Case Study Webinar	02/27/2015	21
New Survivor Sample	02/27/2015	0
New Retirement Sample	02/27/2015	0
John Smith	02/23/2015	0
Cross Selling Case	02/13/2015	0
Julie	01/08/2015	11
	01/08/2015	11
5 SS Myths Webinar 1-6-2015	01/06/2015	11
Annual Review Case Study 12-19	12/19/2014	16
Annual Review Case Study 12-19	12/19/2014	16
Annual Review 12-2014	12/10/2014	23
Miller and Miller Financial	12/05/2014	13
AnnualReview2	12/02/2014	21
AnnualReview5	12/02/2014	22
AnnualReview5-Presentation	12/02/2014	12
AnnualReview5DataOnly	12/02/2014	0
AnnualReviewRandy	12/02/2014	14
AnnualReviewRECORDED	12/02/2014	18
Paul Johnson	11/14/2014	12
Sample Case Webinar	10/24/2014	31
Survivor Case 12	10/10/2014	12
John and Jane SMith - After	09/23/2014	4
John and Jane Smith - Before	09/23/2014	4
Updated Calcs	09/18/2014	0

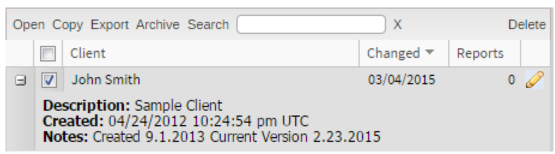
The files are now sorted from most recent to oldest. You can do this on each column.



Clicking on the Pencil allows you to enter notes about the client. Just remember to save the notes



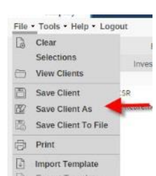
To see the description and notes, click on the plus sign. Click again to close the section



Now that you have the list of client files, check the box next to the file that you wish to open. This will enable your ability to select open.

When you have completed entering client information or creating a presentation, select the Save client icon

If this is the first time that you have worked with this client file, you will be prompted for a name and description. If you are working with a client file that you have previously saved, this icon will overwrite the saved file with the one that you have open. This is the same behavior that you will experience with word processing or spreadsheet products.



If you don't want to replace or over write the data in the original client file, go to the File menu at the top of the screen and select "Save Client As"to create a new file.

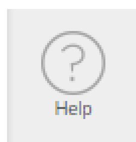
The Save PDF icon

The Save Pdf icon will save the report displayed on the right hand side as a pdf so that it can either be printed later, or emailed to a client as an attachment.

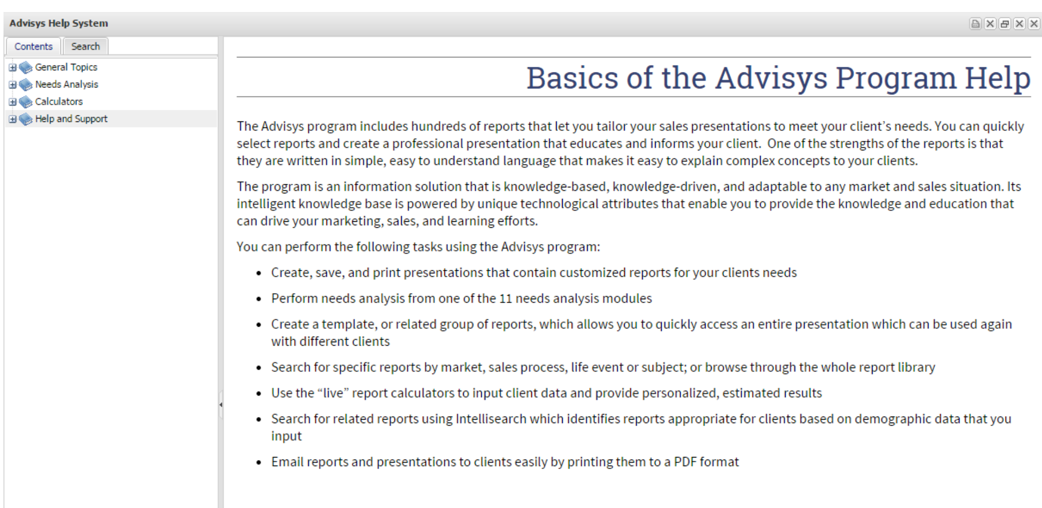
And the Print icon

Will print or save whatever is in the right side of the application using the rules that you have defined in the Presentation Options screen under the Tools menu.

The last icon is help.



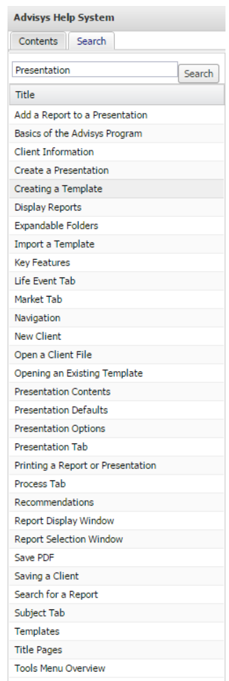
The help topics appear on the right side of the application



Help is always available

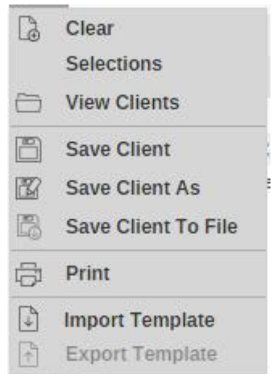
Click here to make the right side fill the screen. This also works when you are viewing reports. Clicking again returns the right side to the normal view.

Click on the Search tab to enter key words



There are help topics on Adding a report to a presentation, creating a presentation, as well as presentation contents

Across the top of the application is the menu bar



Starting with the File menu

You can see Clear, this is the same as selecting clear selections on the left navigation bar

Next is View Clients, this is same as the View Clients icon on the left navigation bar

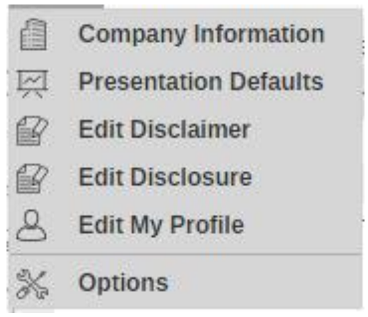
The next item is Save Client. This is the same functionality as the Save Client icon on the left navigation bar.

Save Client As allows you to save the current client information with a name other than the one that is currently saved. This is useful if you want to save multiple versions of files for the same client such as annual updates. You might want to save the file as Paul and Sally Johnson – 2015 and the following year save the file as Paul and Sally Johnson 2016.

The Save Client to File, allows you to save the current client information to a file on your local computer. This is useful if you want to share your client information with an associate.

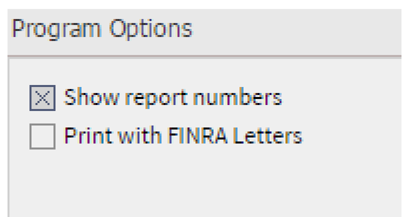
Import Template is a feature that will be discussed in the Using Templates video.

The tools menu



Contains two options not yet covered

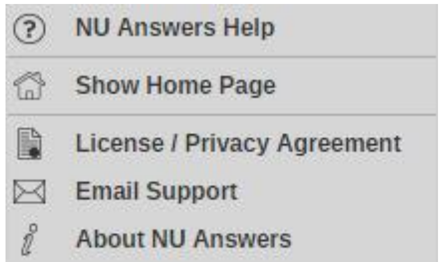
The first is options



The first is to show report numbers. Each report in the NUAnswers product is identified with a unique report id number. If you would like to see these numbers displayed along with the report name, check this box.

The other option is to print with FINRA letters. This feature is designed to help streamline the compliance review process. Many of the reports in the product have been filed with FINRA. If your compliance officer would like to see the letters received from FINRA when reviewing your presentations, select this option. When you print a presentation, or single report, or save them to PDF, the FINRA review letter will be added to the back of the presentation. This is for compliance use only and will not appear in the table of contents nor will they be paginated with the rest of the presentation. You can then mail or email the presentation and FINRA letters to compliance for review.

The last menu option, with the exception of logout, is help.



The first item, NUAnswers Help is the same as selecting the Help icon on the left navigation bar.

The next item is to show the home page. This is the same as selecting the Home icon above the report display window

License/Privacy Agreement displays the license agreement that you agreed to when you first signed into NUAnswers. The privacy statement let's you know that you do not share your information with anyone.

Email Support opens a window that let's your send an email to the support desk.

The last item, About NUAnswers, shows the version of the product that you are using. This is helpful to the support desk if you call with a question.

The last item is logout. Select this when you are finished using NUAnswers for the day.