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.

Search	Favorites	Client Presentations	Presentation
Health/Medical	Investments/Taxes	Income Sources	Protecting Finances

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.



Annual Checkup



This is how to enter this information



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

Name:	Justin Ant Kerr		
Designations:	CSR		
Title:	Senior Client Services Representative		
Company Name:	Advisys, Inc		
Address:	16969 Von Karman Ave Suite 125 Irvine, CA 92606		
Phone:	800-777-3162 ext. 1360		
Mobile:	714-749-5188		
Fax:	949-250-0794		
Email:	jkerr@advisys.com		
Website:	www.advisys.com		
Logo:	AdvisysLogoNew.jpg	Browse	Reset

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.

	1	Company Information	avorites
Le	河	Presentation Defaults	nents/Tax
Clea Selectio	B	Edit Disclaimer	
	P	Edit Disclosure	Retiremen
View Cli	8	Edit My Profile	
	X	Options	
]		

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.

Edit yo	our profi	ile belo	w							
В	Ι	U	E	Ξ	∃					
Fon	t Fam	ily ·	- Fo	nt Size	es	-				
ж	D)	Ô	H	Ε	łΞ	₫	亘	<u>A</u> -	A	
Jus in d to S key	tin h lepar iales role	as w tme , to 1 in tl	orke nts r Fechi he ne	d for angir nical w Cli	Adv ng fr Sup ient	isys f om C port, Servi	for o usto and ices I	ver 6 mer 9 has p Depa	years Servic olayed rtmen	e la it
vith on olay	n his certs /ing a	frien , pla a var	ds ar ying iety c	d fan with l of spo	nily, nis d rts, a	atten og Ze and is	ding us ar an a	local nd cat vid	t Sox,	
con	ipeti	tive	game	er.						
My Pr	ofile O	tive (game	er.						
My Pr Title: Pictur	ofile O	tive (Justin	Yr. Kerr, Cli	ent Sei	vices Re	present	ative	Remov	/e
My Pr Title: Pictur Selec	ofile O	tive (ptions	Justin Bowlir templa	Kerr, Cli ng Me1.jp te	ent Sei og	vices Re	epresent	ative	Remov	/e
My Pr Title: Pictur Select	rofile O re: t a profi	tive (Justin Bowlin templa	Kerr, Cli ng Me1.jp te	ent Sei	vices Re	epresent E	ative Prowse	Remov	/e
My Pr Title: Pictur Selec:	rofile O re: t a profi	tive s	Justin Bowlin templa	Kerr, Cli ng Me1.jp te	ent Ser	vices Re	epresent E	ative	Remov	/e
My Pr Title: Pictur Selec:	rofile O re: t a profi	tive s options le page	Justin Bowlir templa	Kerr, Cli ng Me1.j; te	ent Sei	vices Re	epresent E	ative	Remov	/e
My Pr Title: Selec:	rofile O re: t a profil New school of the school of the sc	tive s	Justin Bowlin e templa	Kerr, Cli ng Me1.jp te	ent Ser	vices Re	epresent E	ative Browse	Remov	/e
My Pr Title: Pictur Select	rofile O re: t a profile t a p	ptions	Justin Bowlin e templa	Kerr, Cli ng Me1.j; te	ent Sei	vices Re	epresent E	ative	Remov	/e
My Pr Title: Pictur Selec:	rofile O re: t a profi i i i i i i i i i i i i i i i i i i	ptions	Justin Bowlir tetempla	Kerr, Cli Ing Me1.Jp	ent Sei	vices Re	epresent E	ative Irowse	Remov	/e
My Pr Title: Pictur Select	rofile O re: t a profile t a profile was a star re: re: re: t a profile t a pr	ptions	yustin Bowlin templa	Kerr, Cli ng Me1.J; te	ent Sei	vices Re	epresent E	tative	Remov	/e

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:

reseritation defaults			
Presentation Contents	Title Pages		
Presentation contents		Disclaimers	
X Title Page		Disclaimer	
X Table of contents		Disclosure	
X Personal Profile Page		Placement: () Beginn	ing (a) End
Record of reports			
Page setup			
Page setup			
Page setup Header	Advisys	inc. 949-419-1360	
Page setup Header Sofoster Page numbers	Advisys	.inc. 949-419-1360 prmat: 🕐 Page X 😰	Page X of Y
Page setup Header Pooter Page numbers Page numbers Presentation date	Advisys Fr 4/29/20	Inc. 949-419-1360 ormat: O Page X @ 15	Page X of Y
Page setup Header Poter Page numbers Page numbers	Advisys Fr 4/29/20	.inc. 949-419-1360 prmat: Page X @ 15	Page X of Y

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.

Health/Medical	Investments/Taxes
Report Title	
🔺 📇 Health Care Pla	annin <mark>g in Retirement</mark>
▷ 🛅 Medicare	
▷ 🦳 Medigap	
▷ 🛅 Reverse Mo	rtgages
▷	Decision Making
▷ 🛅 Health Insuran	ce
Long-Term Car	e
Disability	

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.

Report Title Investment Planning and Objectives Bonds Stocks and Securities Annuities Taxes	Health/Medical	Investments/Taxes	Income Sources	Protecting Finances
	Report Title			
	Investment Pl	anning and Objectives		
	Bonds			
Image: Provide the second s	Stocks and Se	curities		
Taxes	Annuities			
	🕨 🚞 Taxes			

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.

Health/Medical	Investments/Taxes	Income Sources	Protecting Finance
Report Title			
▷ 🛅 Life Insurance	Considerations		
▷ 🗁 Types of Life In	isurance		
▶ 🛅 Business Suce	ssion 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.

Cear Selections View Clients Save Client Save Polent Der Save Polent

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.

Presentation Contents	Client Information	Title Pages	
Presentation contents Title Page Table of contents Personal Profile Page Record of reports	Disc Disc Disc	isclaimer isclaimer isclosure ement: @ Beginning () End	
Page setup Header Footer	Format:	Page X Page X of Y	

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.

Irocontation Contonte	Client Information	Title Dogec	
Presentation Contents	Client information	The Pages	
Client's personal data			
Name:	John and Jane Smith		
Address:	i55 Any Street Any Town, USA		
Phone:			
Mobile:]

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

Presentation Contents	Client Information	Title Pages		
Title page setup				
Title Line 1:	Preparing for Retireme	int		
Title Line 2:				
Title Line 3:				
Picture:			Browse	Reset
Select a title page tem	plate			
Bir che i Thicken i Bir che i Thicken i Bir che i Bir ch	The Law 1 The Law 1 The Law 2 The La	The Level Table Le		
				-
Preview 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

Presentation Contents	Client Information	Title Pages		
Title page setup				
Title Line 1:	Preparing for Retireme	nt		
Title Line 2:				
Title Line 3:				
Picture: 5	Sunset Waves.jpg		Browse	Reset
	The Law P The Control of Control	The Law J The Law J The Second		•
Preview title page]			

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.

Ciear Selections	
View Clients	
Save Client	
PDF Save PDF	
Print	
?	

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

client:	Paul and Sally Johnson
Description:	Retirement First Appointment
Notes:	Completed 3.2.15 Revised 3.4.15

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.

Act	tive	Archive		Close
Op		opy Export Archive Search	x	
		Client	Changed 🔻	Reports
±		Calcs Webinar	03/03/2015	23 🥜
		Personal Finance Case Study Webinar	02/27/2015	21 🥜
۰		New Survivor Sample	02/27/2015	0 🥜
		New Retirement Sample	02/27/2015	0 🥜
\blacksquare		John Smith	02/23/2015	0 🥜
\pm		Cross Selling Case	02/13/2015	0 🥜
\blacksquare		Julie	01/08/2015	11 🥜
۰			01/08/2015	11 🥜
		5 SS Myths Webinar 1-6-2015	01/06/2015	11 🥜
\blacksquare		Annual Review Case Study 12-19	12/19/2014	16 🥜
\pm		Annual Review Case Study 12-19	12/19/2014	16 🥜
\blacksquare		Annual Review 12-2014	12/10/2014	23 🥜
۰		Miller and Miller Financial	12/05/2014	13 🥜
		AnnualReview2	12/02/2014	21 🥜
\blacksquare		AnnualReview5	12/02/2014	22 🥜
\pm		AnnualReview5-Presentation	12/02/2014	12 🥜
\blacksquare		AnnualReview5DataOnly	12/02/2014	0 🥜
۰		AnnualReviewRandy	12/02/2014	14 🥜
		AnnualReviewRECORDED	12/02/2014	18 🥜
\pm		Paul Johnson	11/14/2014	12 🥜
\blacksquare		Sample Case Webinar	10/24/2014	31 🥜
۰		Survivor Case 12	10/10/2014	12 🥜
۰		John and Jane SMith - After	09/23/2014	4 🥔
۰		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.

Client:	John Smith
Description:	Sample Client
Notes:	Created 9.1.2013 Current Version 2.23.2015

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

		Client	Changed 🔻	Reports	
Ξ		John Smith	03/04/2015	0	
	De Cre No	scription: Sample Client sated: 04/24/2012 10:24:54 pm UTC tes: Created 9.1.2013 Current Version 2.23.20	015		

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

Ope	en C	opy Export Archive Search	x	Delete
		Client	Changed 🔻	Reports
	V	John Smith	03/04/2015	0 🥜
	Description: Sample Client Created: 04/24/2012 10:24:54 pm UTC Notes: Created 9.1.2013 Current Version 2.23.2015			

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

Save Client	

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.

D	Clear	
	Selections	Inve
0	View Clients	
6	Save Client	SR
1	Save Client As	The second second
閟	Save Client To File	
8	Print	
	Import Template	
	Export Template	

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

Contents Search	
🗄 🎨 General Topics 🖻 🎨 Needs Analysis	Basics of the Advisys Program Help
ar ≪ Calculators ar ≪ Help and Support	The Advisys program includes hundreds of reports that let you tailor your sales presentations to meet your client's needs. You can quickly select reports and create a professional presentation that educates and informs your client. One of the strengths of the reports is that they are written in simple, easy to understand language that makes it easy to explain complex concepts to your clients.
	The program is an information solution that is knowledge-based, knowledge-driven, and adaptable to any market and sales situation. Its intelligent knowledge base is powered by unique technological attributes that enable you to provide the knowledge and education that can drive your marketing, sales, and learning efforts.
	You can perform the following tasks using the Advisys program:
	Create, save, and print presentations that contain customized reports for your clients needs
	Perform needs analysis from one of the 11 needs analysis modules
	Create a template, or related group of reports, which allows you to quickly access an entire presentation which can be used again with different clients
	Search for specific reports by market, sales process, life event or subject; or browse through the whole report library
	Use the "live" report calculators to input client data and provide personalized, estimated results
	Search for related reports using Intellisearch which identifies reports appropriate for clients based on demographic data that you input
	Email reports and presentations to clients easily by printing them to a PDF format
	The Advisys program is designed for the Windows user interface and functions like other Windows applications.

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

Advisys Hel	p Systen	1	
Contents	Search		
Presentation			Search
Title			
Add a Report	t to a Pres	entation	
Basics of the	Advisys P	rogram	
Client Inform	nation		
Create a Pre	sentation		
Creating a T	emplate		
Display Repo	rts		
Expandable F	olders		
Import a Ter	nplate		
Key Features			
Life Event Ta	b		
Market Tab			
Navigation			
New Client			
Open a Clier	t File		
Opening an B	Existing Te	emplate	
Presentation	Contents		
Presentation	Defaults		
Presentation	Options		
Presentation	Tab		
Printing a Re	port or Pr	esentation	
Process Tab			
Recommend	ations		
Report Displ	ay Windov	v	
Report Selec	tion Wind	ow	
Save PDF			
Saving a Clie	nt		
Search for a	Report		
Subject Tab			
Templates			
Title Pages			
Tools Menu (Overview		

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.





Contains two options not yet covered

The first is options

Program Options	
Show report numbers	

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.

?	NU Answers Help
	Show Home Page
	License / Privacy Agreement
\bowtie	Email Support
ů	About NU Answers

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.