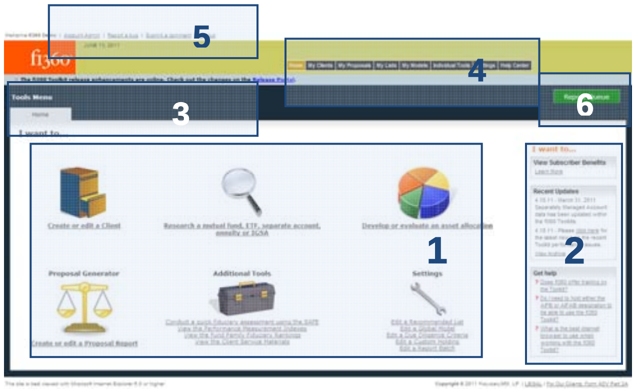
Now that you are a fi360 Toolkit user, where do you start?

Start Here!

Log in to your Toolkit account at www.fi360.com.

If you don't have a Toolkit account, register for the free 30 day trial to the Platinum version at www.fi360.com/FreeToolkitTrial.

All pages have the same basic layout described below:



1. **Tools Workspace** – The main area of the Toolkit where tools and information will be displayed.

2. **I want to… Panel** – The section helps users edit information, produce reports, access Toolkit features, and view FAQ's.

3. **Tools Tabs** – The tabs help users navigate a specific section or tool within the Toolkit. They also serve as an indication of your location within the Toolkit.

4. **Tools Menu Bar** – The menu bar provides navigation across all areas of the Toolkit.

5. **Admin Account Section** – The section provides access to edit user account information, view subscription details, upgrade account status, add users, assign licenses, provide feedback, and more.

6. **Report Queue** – Click on this button to view all completed and in-process reports for today.

The core tools and their functions…

My Clients

Functions: Store customer information, review asset allocations, generate an Investment Policy Statement (IPS), enter holdings and expenses, manage the Watch List, and create a variety of custom reports.

Fast Facts:
- Follows the 4 step Investment Management Process outlined in the Prudent Practices for Investment Fiduciaries handbook series
- Customizable IPS Watch List Process.
- Generate custom reports or produce one of the fi360 default reports (Monitoring report, fi360 Fiduciary Score® Breakdown, Snapshot report, Model Portfolios report, and Fee & Expense report).
- Unlimited client storage and report generation.
- Store historical client data used in trending report sections and historical analysis.
- Designed and customized for Retirement Plans, Individuals, Trusts and Foundations/Endowments.

Investment Analyzer

Functions: Dynamically create and save complex searches, produce detailed Profiles, Comparisons, Snapshot Reports, Data Exports and much more.

Fast Facts:
- Reduce a large universe down to a manageable short list in seconds. Data is sourced from Morningstar on a quarterly basis.
- Mutual Fund/ETF, Separate Account, Annuity and IGSA data sets.
- Numerous search factors and thresholds are available including the fi360 Fiduciary Score.
- Upload a custom universe or platform for review.

My Proposals

Functions: Quickly create a plan or portfolio comparison report that can be used for an RFP or client re-allocation proposal.

Fast Facts:
- Create a report with three short steps. (1) Add investments for the current lineup (2) Add investments for the proposed lineup. (3) Map the differences.
- Unique mapping helps to track money moving from the current to proposed lineup. Allocation changes can also be displayed.
- Create a custom report that will highlight the differences between the lineups in an easy to read, side-by-side format.

Settings Area

Customize and optimize the fi360 Toolkit for your practice. Settings areas include:

- User Settings
- Report Settings
- Watch List Mgmt. Settings
- Benchmarks
- Asset Class Mapping

Additional Tools

Utilize and download pertinent documentation to be used in your practice:

- SAFE
- Fund Family Fiduciary Rankings
- WCI & TCI Indexes
- Client Service Materials

Help Center

Review and learn from:

- Video Tutorials
- Webinars
- Comprehensive FAQ's
- Glossary

Access:

- FINRA-Reviewed Reports and response letters
- Other Toolkit documentation

If you can't find what you are looking for in our Help Center, email us at tools@fi360.com or give us a call at 1-866-390-5080.

fi360 global fiduciary insights