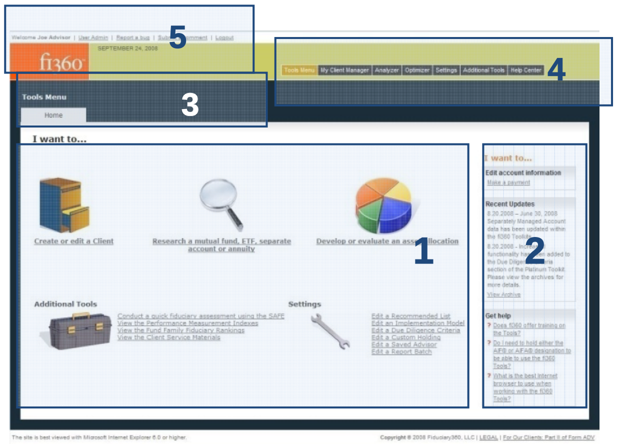
Now that you are a fi360 Toolkit user, where do you start?

Start Here!

Login to your Toolkit at www.fi360.com.

If you don't have a Toolkit account, register for the free 14 day trial to the Platinum Toolkit.

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 right-hand 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 your Toolkit. They also serve as an indication of where you are in the site.

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

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

The core tools and their functions…

My Client Manager

Functions: Store customer information, establish an asset allocation, generate an Investment Policy Statement (IPS), enter holdings, 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
- Reports include the Monitoring Report, fi360 Fiduciary Score™ Breakdown, Plan Snapshot, Flash Report, Proposal Report and more.
- Unlimited client storage and report generation
- Designed and customized for Retirement Plans, Individuals, Trusts and Foundations/Endowments.

Investment Analyzer

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

Fast Facts:
- Data is sourced from Morningstar on a quarterly basis.
- Mutual Fund/ETF, Separate Account and Annuity Databases
- Numerous investment search factors and thresholds are available including the fi360 Fiduciary Score™
- Upload a custom universe or platform

Asset Allocation Optimizer

Functions: Dynamically move across the Resampled Efficient Frontier ™ (REF) to create optimal allocations or manually enter existing allocations to compare against the REF.

Fast Facts:
- Resampled Efficiency ™ (RE) is a patented process developed by New Frontier Advisors, LLC.
- Results in more realistic use of investment information and more effective asset allocations by treating risk-return estimates consistent with investor uncertainty.
- RE is the only provably effective portfolio optimization procedure in the world today, outperforming traditional optimizers in rigorous statistical tests.

Settings Area

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

- User Settings
- Report Settings
- Watch List Mgmt. Settings
- Proposal Settings

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