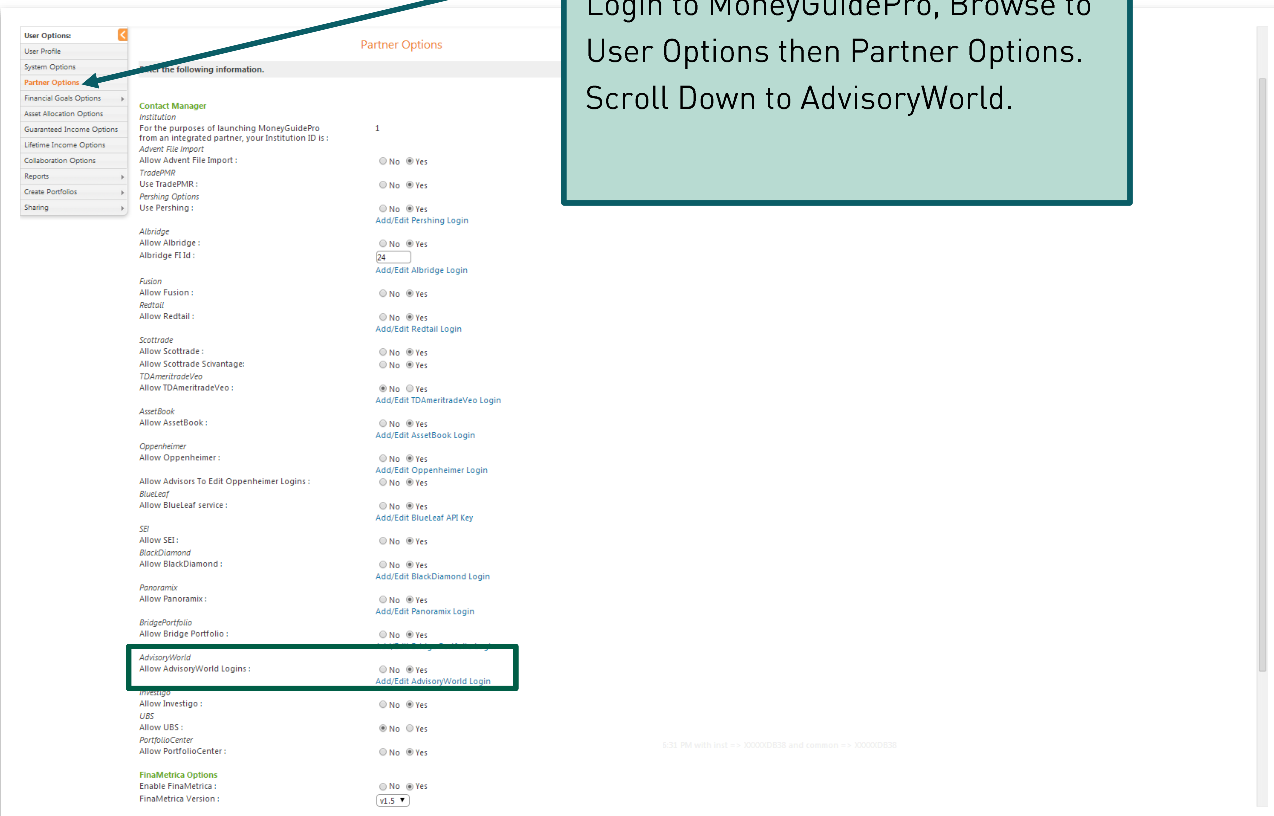
SCANalytics

How to: Setup MoneyGuidePro Integration

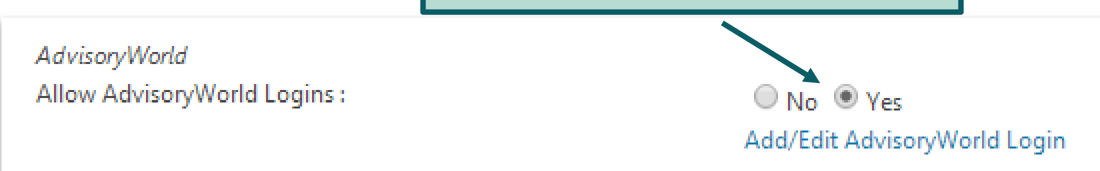
ADVISORYWORLD
FINANCIAL TECHNOLOGY

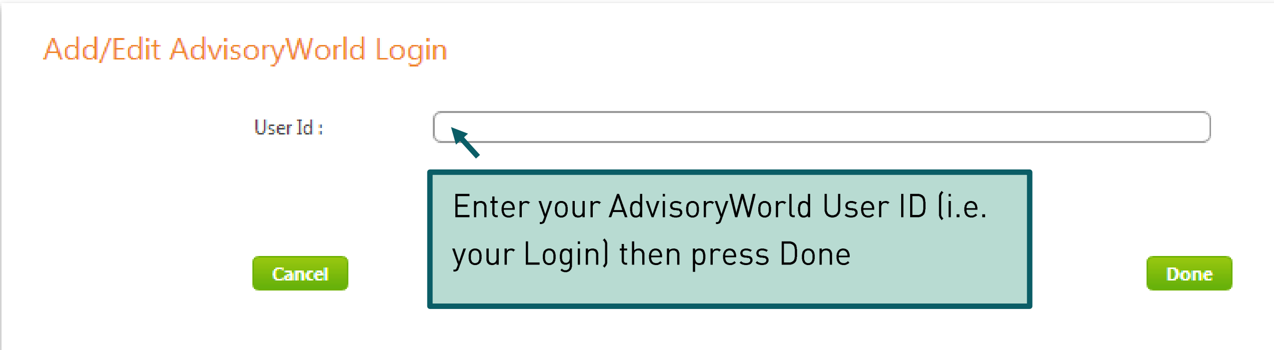
MoneyGuidePro Settings

Login to MoneyGuidePro, Browse to User Options then Partner Options. Scroll Down to AdvisoryWorld.

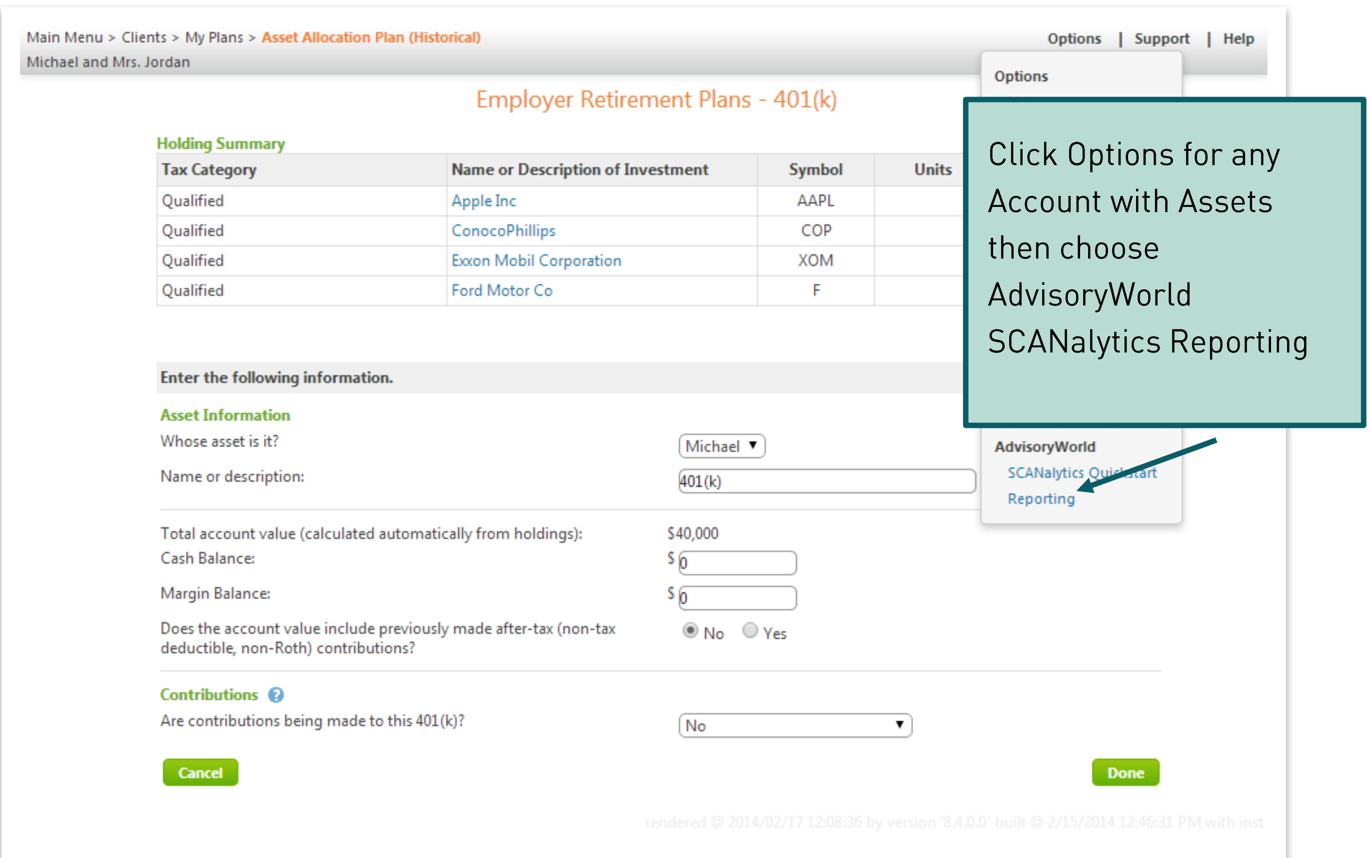


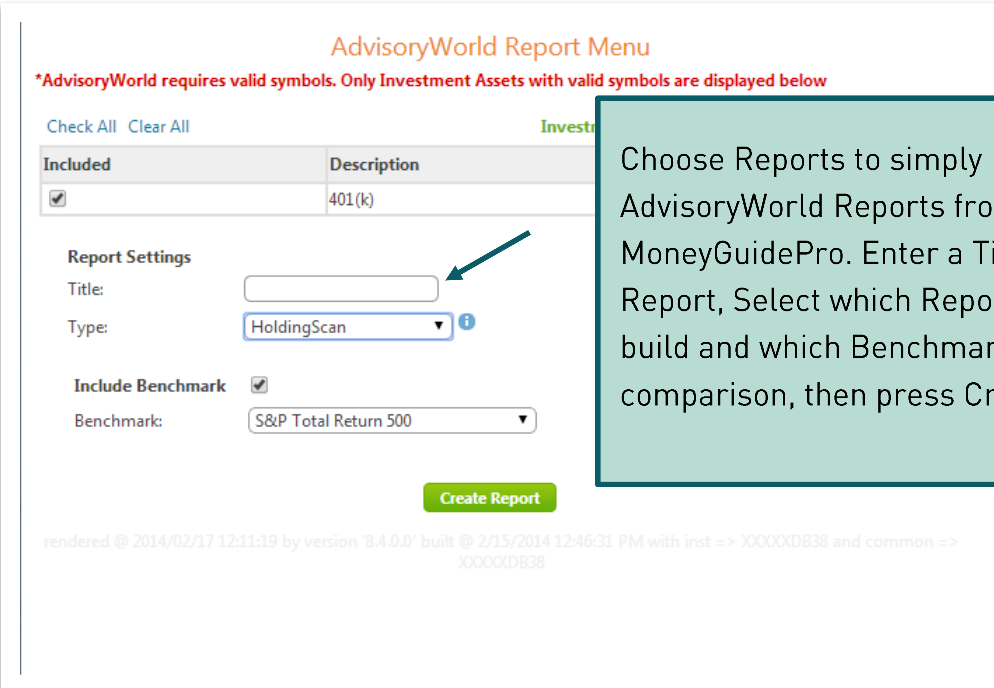
Select Yes then click Add/Edit AdvisoryWorld Login



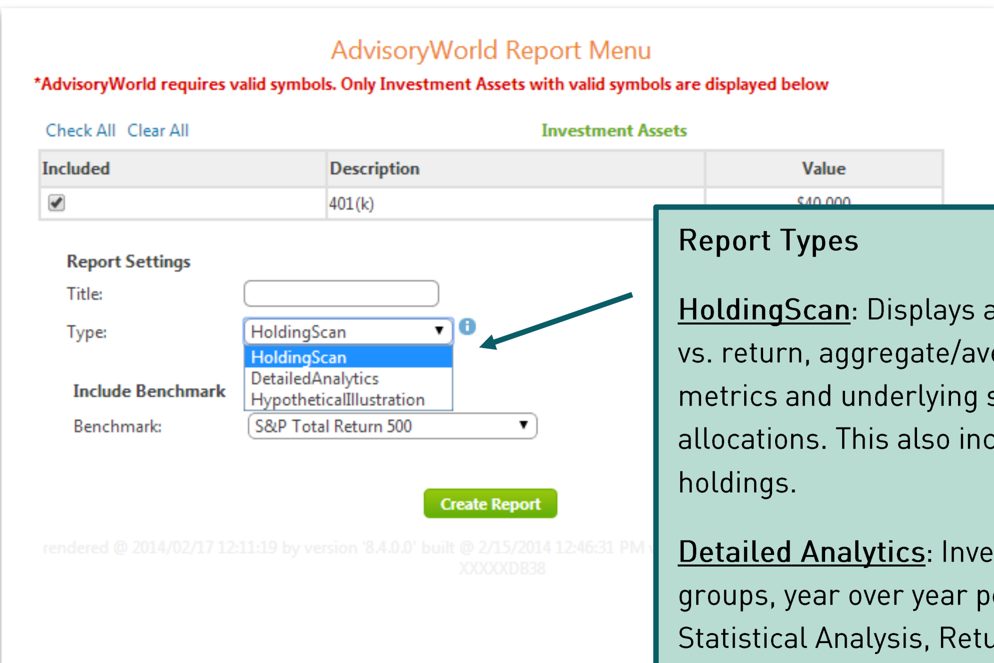


Accessing AdvisoryWorld Reports through MoneyGuidePro





Choose Reports to simply Build AdvisoryWorld Reports from MoneyGuidePro. Enter a Title for the Report, Select which Report Type to build and which Benchmark to use for comparison, then press Create Report.

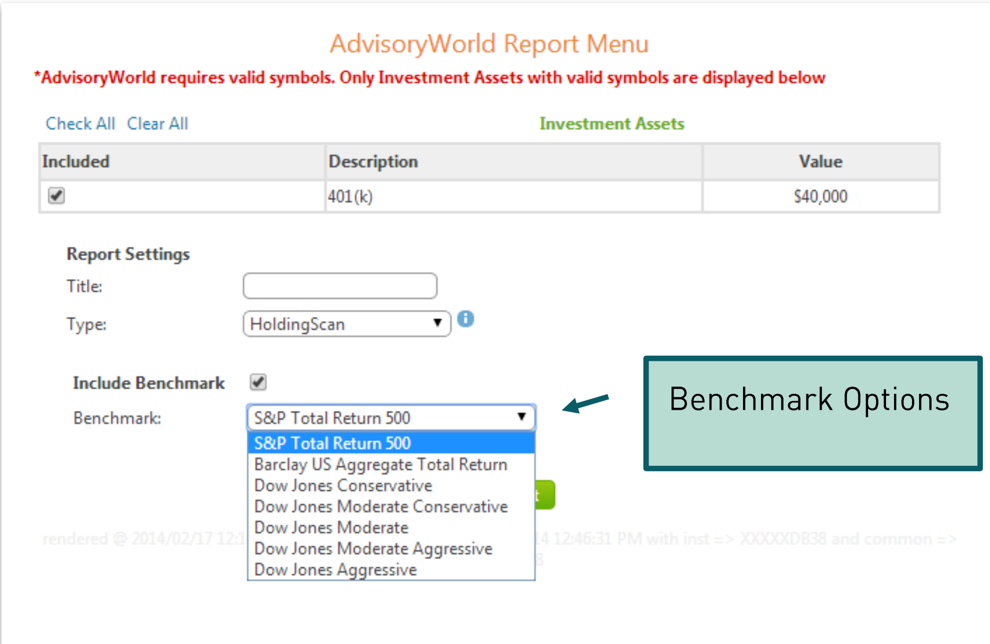


Report Types

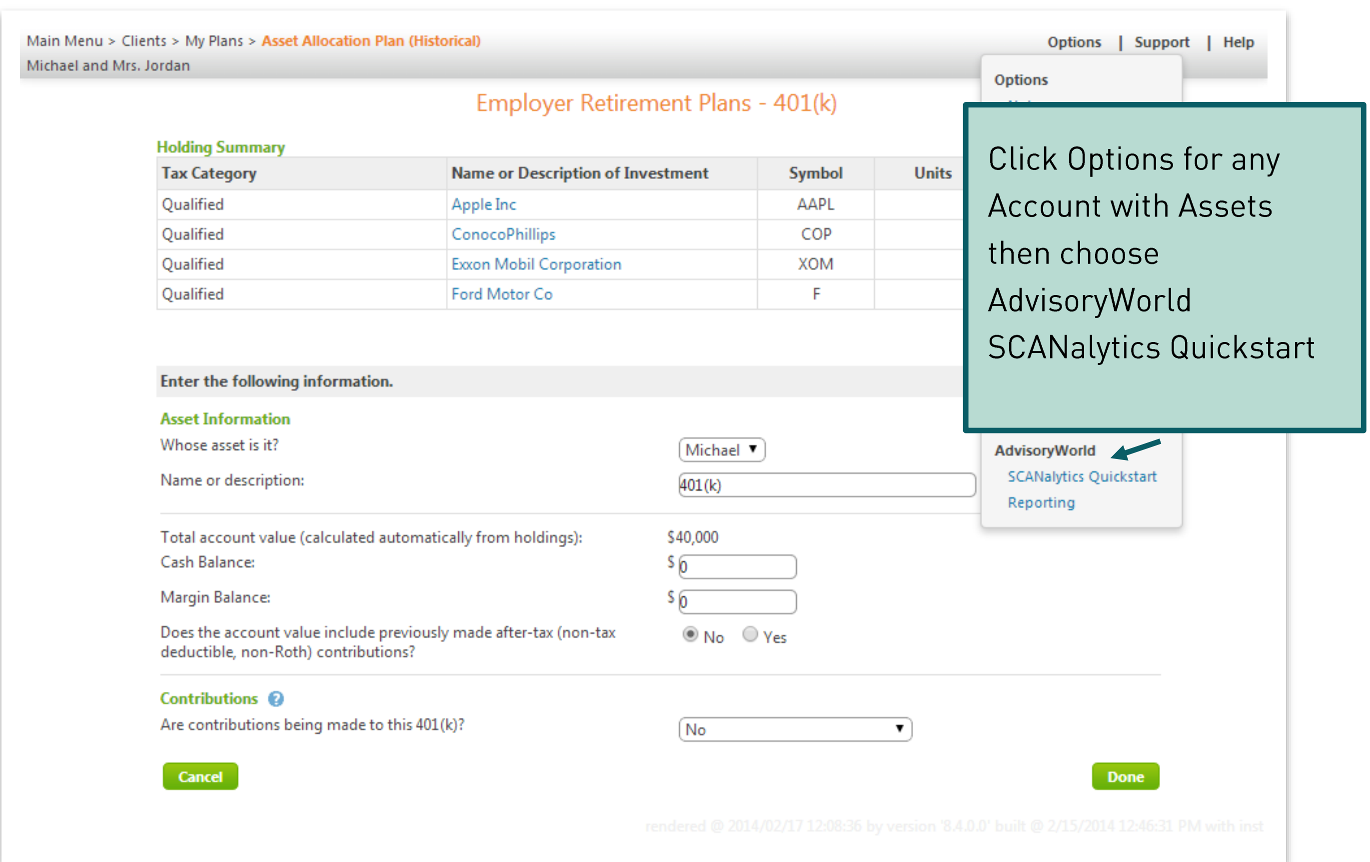
<u>HoldingScan</u>: Displays asset allocation, performance, risk vs. return, aggregate/average expense, equity and bond metrics and underlying sector, country and holding allocations. This also includes Fact Sheets for each of the holdings.

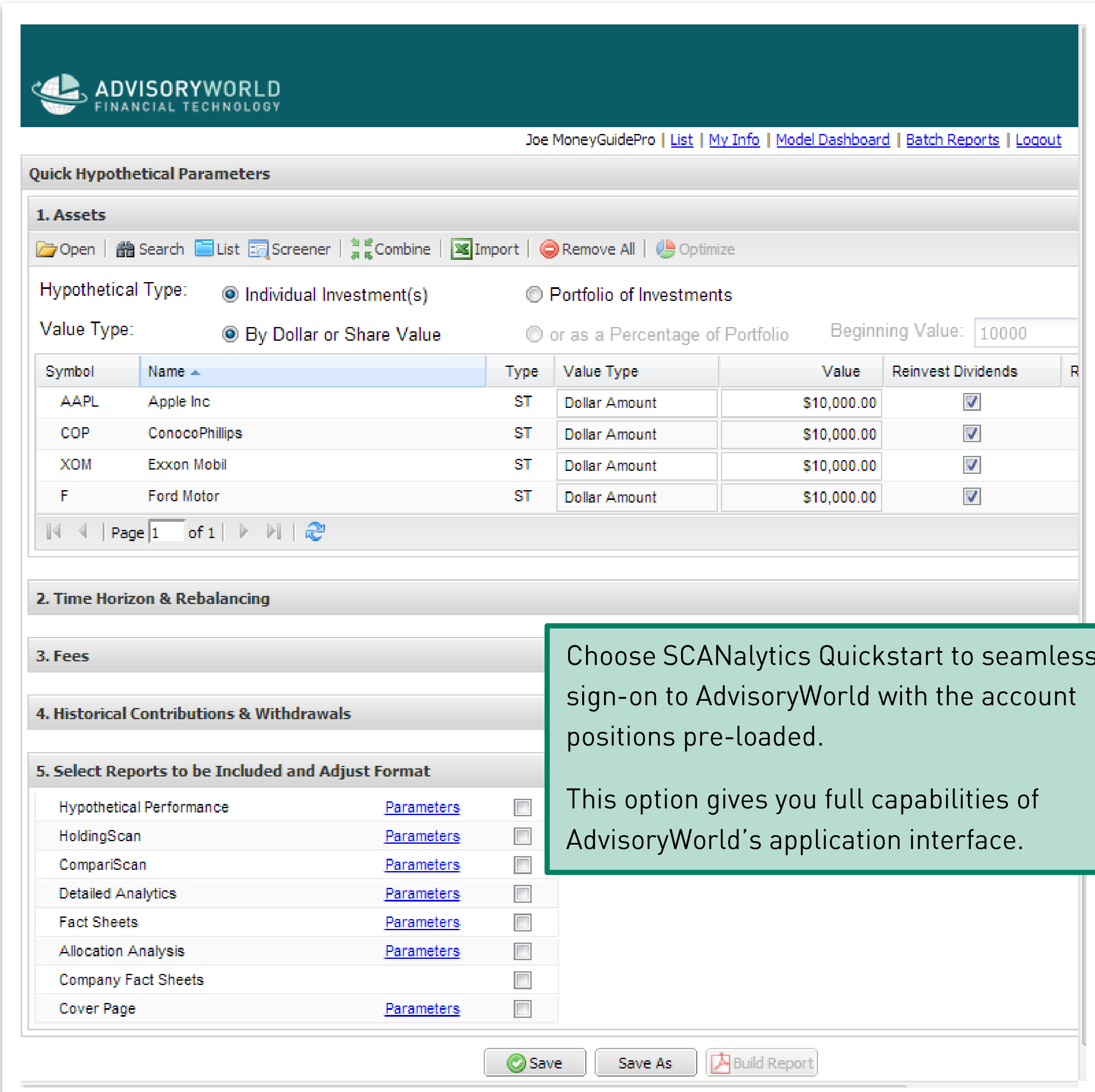
<u>Detailed Analytics</u>: Investment performance vs. peer groups, year over year performance, detailed MPT Statistical Analysis, Returns Based Style Analysis and Risk Metrics including Return and Value Ranges with Probability Boundaries.

<u>Hypothetical Performance</u>: Displays historical hypothetical performance of the Investment or Portfolio of Investments including annual and cumulative metrics plus principal, capital gain and income accumulation.



Accessing AdvisoryWorld SCANalytics through MoneyGuidePro





Choose SCANalytics Quickstart to seamlessly sign-on to AdvisoryWorld with the account positions pre-loaded.

This option gives you full capabilities of AdvisoryWorld's application interface.