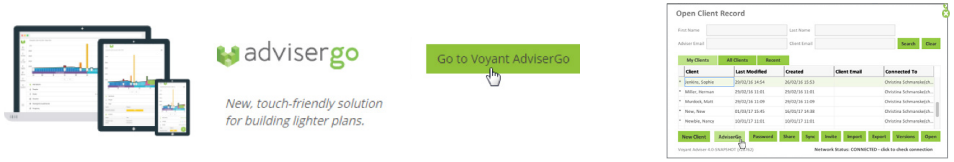
QUICK START GUIDE

Getting Started with Voyant AdviserGo

Requirements

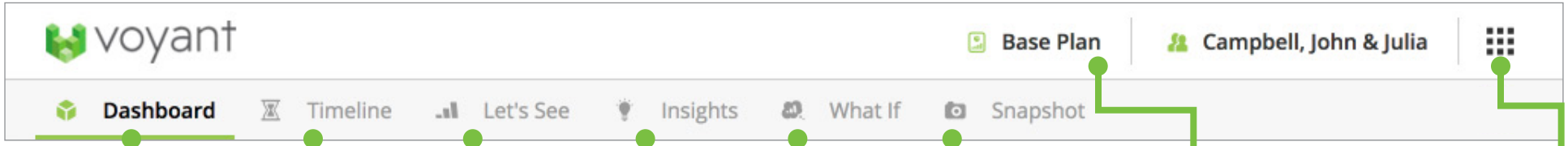
- Supported Web Browser (Chrome, Safari, Firefox, Opera, Edge, and Internet Explorer 11 or later)
- Internet Connection
- Voyant user account

Getting Started



Sign into our website and click "Go to AdviserGo". Or, select a client from the Client Search dialog in Voyant Adviser and click the "AdviserGo" button to launch from the application. Need help signing in? **Learn more.**

Navigation



Dashboard
Build a new plan or edit an existing plan and immediately see how each change affects the financial outcome.

Let's See
A full-screen view of the long-term plan results. Dual charts are only available on the Let's See page.

What-If
Create copies of an existing plan or follow a guided wizard to plan for a range of possible scenarios.

My Plans
Click on the current plan name to switch plans, create reports, and compare Let's See charts from multiple plans.

Timeline
View and edit the timeline. Events can be added before or during the planning process using the event selector.

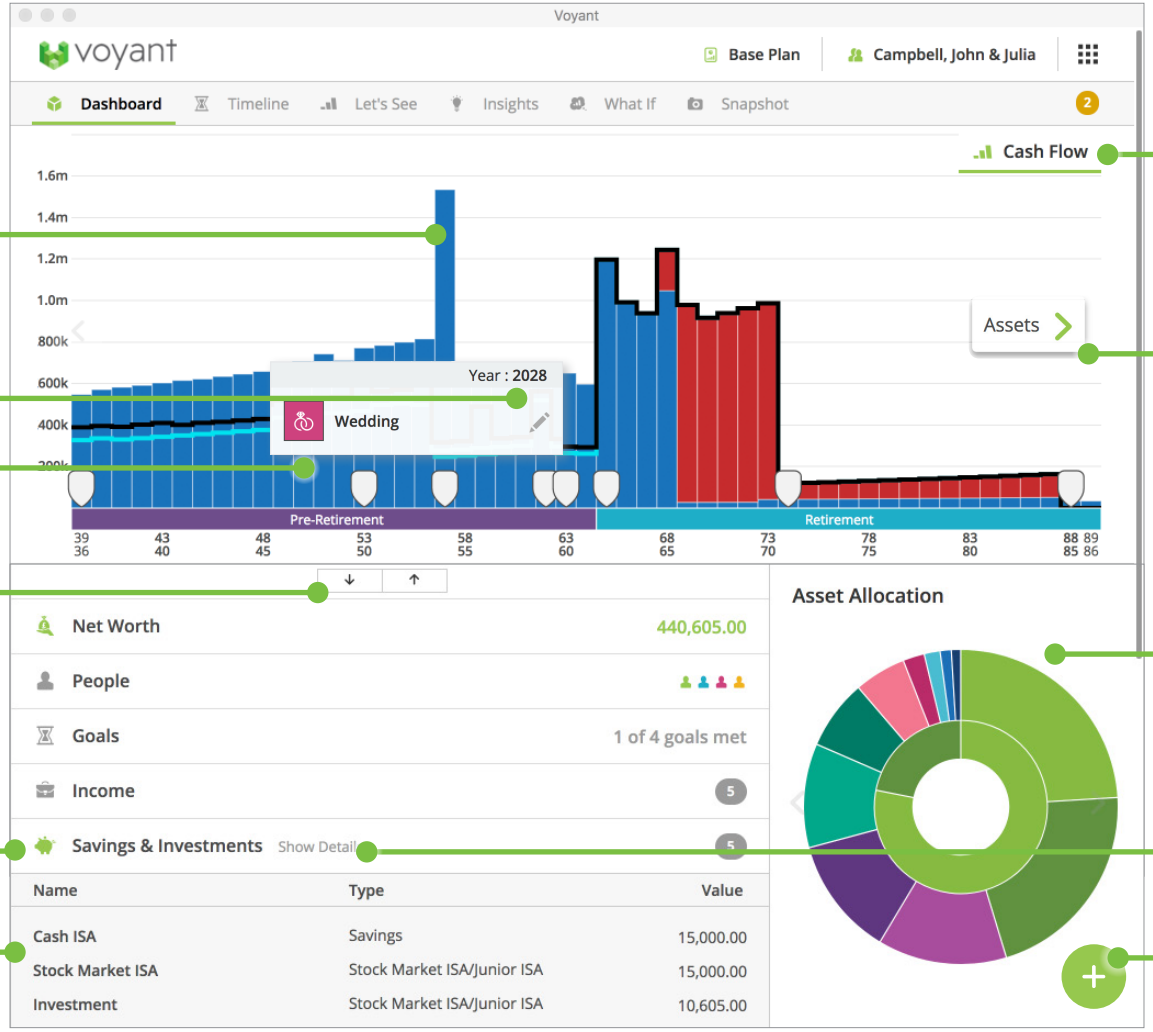
Insights
Select from a range of simulations and scenario planners to stress-test plans and create insight reports.

Snapshot
An up-to-date comparison of where a plan is today versus at plan start or any future projection in the plan.

Additional Options
Click the grid icon to access more links, including the client search page, client access and preferences.

Dashboard

The Dashboard is a one-stop shop for building your plan. Use the guide below to learn the basics.



Detailed Year-View

Double-click on any 'bar' in the bar chart to view a drilldown view of the plan projections.

Easily edit timeline

Click a white event indicator on the chart to see event details. To edit an event, click the pencil.

Open/Collapse All Categories

See Existing Plan Items

Click to open a category and see underlying items. Click on an item in the list to edit.

Access Chart controls

Click the chart name to see a list of available charts. Dual charts are only available on the Let's See page.

Swipe to switch charts

Swipe left or right, or use the arrow indicators to browse the available Let's See charts. Swipe up to see a detailed chart.

Asset Allocation

Double-click to see a detailed view of the plan's overall asset allocation.

Show Details

Click to see the asset allocation for this category of plan items.

Build your plan

Click the plus button to add items to your financial plan.

Building a Plan

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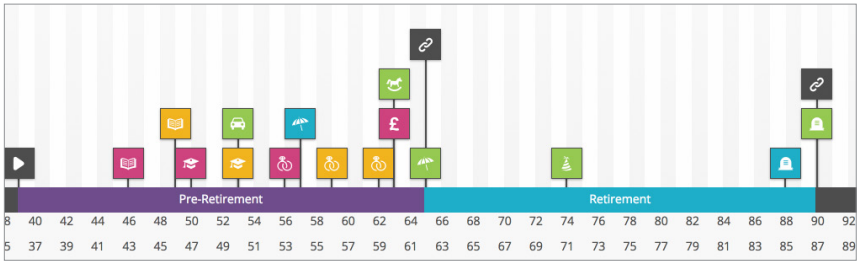
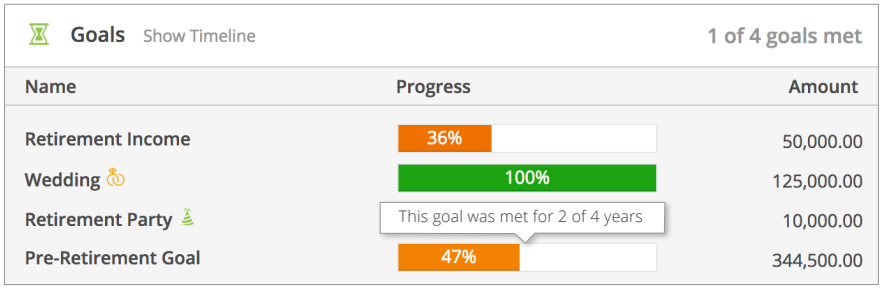
Populate your Timeline



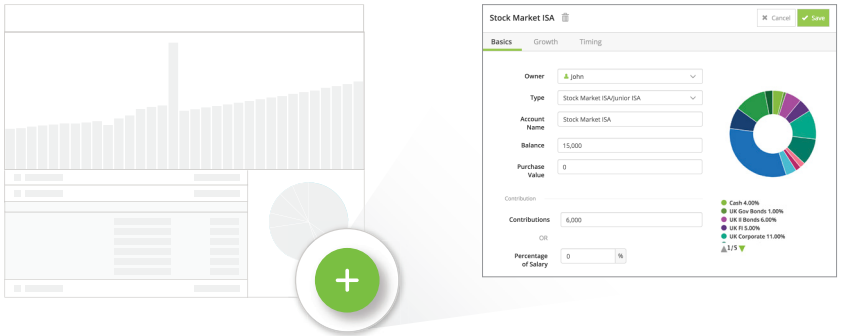
The timeline illustrates life as a series of stages and events. Events are used to set the start and end year of plan items and allow for effortless revision. Retirement and mortality goals are automatically created for the primary plan owner and their spouse. Events can be added from the plus button menu or on the timing tab.

Set your Goals



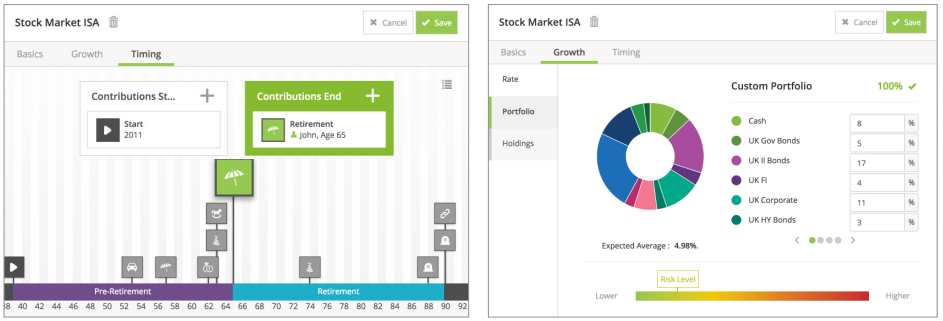
Goals are prioritized expenses that are linked to specific events. As events are moved on the timeline, goals will automatically re-align with the linked events. Create custom goals or use our pre-built flows for building pre-retirement and retirement goals. Check the status of your goal on the dashboard or the timeline page.

Add the Basics



Build your plan directly from the dashboard. Click the plus button and then select an item type to begin adding items to a plan. The basics tab is where you enter account details, including owner(s), item type, balance and more. Events and goals can also be added from the plus button menu.

Plan for the future



The timing and growth tabs are used to accurately project your account throughout the length of a plan. The timing tab sets the start and end events for each plan item. Certain items have default events assigned to them upon creation. To set an item's timing, select either the 'start' or 'end' tile and then select an event from the timeline below. The growth tab is used to project the growth of certain types of plan items.

Looking forward

Creating a What-If Plan

What-if Plans are copies of existing plans that can be used to explore future planning scenarios. To get started, go to the 'What-If' page, accessed from the navigation. Once your new plan is created, you will be switched to that plan. Edit existing items from the dashboard or add items using the plus button.

Guided Plan Creation

Buy a Home

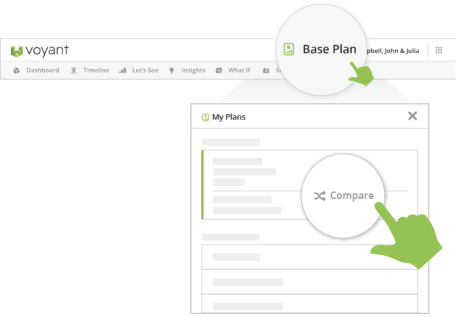
Change Life Expectancy

Rightsize Home

Retire Earlier or Later

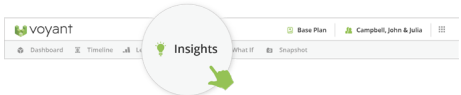
The guided plan creation tools can be used to plan for common financial scenarios such as early retirement or the downsizing of a family home. As steps are completed, the charts will dynamically update to reflect the changes. Once the wizard is finished, you will be switched to your new plan.

Managing and Comparing Plans



To switch plans and manage existing plans, click the 'My Plans' link in the navigation. Click a plan in the list to view other options, such as Delete or Switch Plans. Click the compare button in the plan options, then select two plans to compare charts.

Insights



Insights are used to stress-test your plan. To use insights, click the link in the navigation and select a scenario from the list of options to see more details. Click 'explore this scenario' to begin.