

Your guide to finding Advisor360° Resources

Use this document to locate and identify available Advisor360° Resources including documentation, training, and other useful resources.

Resource	Description
<u>Best Practices for Setting Up Advisor360° Checklist</u>	Use this checklist to ensure you set up your practice correctly with Advisor360° on Day One.
Advisor360° In-App Help	<p>In-App Help is available on most Advisor360°, Practice360°, and Client360° pages. The help file provides additional performance support on the page and how to perform specific tasks and functions.</p> <p>Locate In-App Help by finding and locating the ? icon in the top right-hand corner of the Advisor360° platform.</p>
<u>Advisor360° FieldNet Page</u>	Useful Resources which include: <ul style="list-style-type: none"> • Newsletters and Communication • Advisor How-To Lists • Advisor360° Spotlight Videos • Question and Answers Log
<u>Advisor360° Resources FieldNet Page</u>	Advisor360° resources organized by topic to prepare you for the Advisor360° Launch. This page includes: <ul style="list-style-type: none"> • Reference Material • User Guides • Advisor How-To Videos
<u>Advisor360° Training Page</u>	Advisor360° training organized by topic to prepare you for the Advisor360° Launch. This page includes: <ul style="list-style-type: none"> • Required eLearning • Reference Material • Case Studies • Advisor How-To Videos
<u>MMLIS Knowledge Center</u>	MMLIS documentation that focuses on policy and procedures for submitting and maintaining broker-dealer business and incorporates Advisor360° as applicable. Content may include, but not limited to: <ul style="list-style-type: none"> • New Business Submission • Servicing Accounts • Investor Tools • Compensation • Tools and Technology

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