

Planning Calculators

Landing Page

1. Links to toggle between “Dashboard” and “Client Page”
2. Search for a client you have established within the calculator site or “show all”
3. Clients you have recently accessed within the calculator site will display here
4. From here you can add a new client or entity

Dashboard | Client List

Users: GREGORY DAVIS Log Out

Dashboard Clients 1

Client List

Access

My Clients
 My Entities

Search

Last Name: 2
First Name:
Consumer Access #:
Family ID:

Show All Search

Recently Accessed

Name	Date Last Accessed
Smith, John	01/25/2018
Davis, Gregory	01/25/2018

3

Clients

Add Client Add Entity 4

Last Name	First Name	Consumer Access #	Birth Date	Age	Gender	Owner	Edit
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Best Practices

- Clicking on “Dashboard” will take you to a screen where the Advisor can enter information that will show on client reports
- User information will be displayed in the upper right hand corner of the screen
- Users should use the “Log Out” button when done running calculations

Planning Calculators

Advisor Information

1. Information currently entered for the Advisor will show in the “My Information” box
2. The Advisor can enter relevant data about themselves and their firm here. This data will be displayed both on the cover and throughout generated reports

Best Practices

- Clicking on the gear icon will launch the “Edit My Information” box
- Remember to update the “Company Name” from the existing default

The screenshot shows a dashboard interface with two main components. On the left, a 'My Information' box (labeled with a circled '1') displays the following data: First Name: GREGORY, Last Name: DAVIS, Business address line 1, Business address line 2, City, State, Zip, and Email Address. On the right, an 'Edit My Information' dialog box (labeled with a circled '2') is open, allowing for data entry. The fields in this dialog are: First Name * (GREGORY), Middle Name, Last Name * (DAVIS), Title / Designations 1, Title / Designations 2, License Number, Company Name (Fidelity Investments), Business Address Line 1 * (100 Salem St 015), Business Address Line 2, and City * (Smithfield). The dialog box includes 'Cancel' and 'Save' buttons at the bottom.

Planning Calculators

Working with Clients

1. From here you can add a new client or entity
2. Search for a client you have established within the calculator site or “show all”
3. Clients you have recently accessed within the calculator site will display here
4. Search results will appear here

The screenshot shows a web application interface for managing clients. It features a sidebar on the left with sections for 'Access' (My Clients, My Entities), 'Search' (Last Name, First Name, Consumer Access #, Family ID), and 'Recently Accessed' (Smith_John, Davis_Gregory). The main area displays a table of clients with columns for Last Name, First Name, Consumer Access #, Birth Date, Age, Gender, Owner, and Edit. A search result for 'Smith, John' is shown. Numbered callouts indicate: 1. 'Add Client' and 'Add Entity' buttons; 2. Search input fields; 3. 'Recently Accessed' list; 4. Search results table.

Last Name	First Name	Consumer Access #	Birth Date	Age	Gender	Owner	Edit
Smith	John		01/01/1970	48	Male	G. DAVIS	

Best Practices

- Clicking on “Add Client” will take open a screen allowing you to create a client and linked relationships
- The “Client” section on the right hand side of the screen will show search results
- Clicking the “Edit” icon will allow you to edit the information for that client and linked relationships
- Clicking the client’s name will launch a tab for that client and allow you to use that client with the various modules

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Client Setup

1. Marital Status indicator for client
2. Demographic information for client and co-client
3. Address information for client (not required)
4. Ability to add additional relationships to the client

Dashboard | Client List

Dashboard Clients

Add Client

Marital Status 1

Client Prefix First Name* Middle Name Last Name*
Birth Date* Gender* Consumer Access #

2

Co-Client Prefix First Name* Middle Name Last Name*
Birth Date* Gender* Consumer Access #

Contact Information

Address Line 1 City State Zip
Address Line 2 Phone Email

Contact Method 3

Relationships 4

First name	Middle Name	Last Name	Birth Date	Gender	Dependent	Relationship Type	Edit	Delete
Jane		Smith	01-01-2000	Female	Yes	Daughter		

* Indicates required information

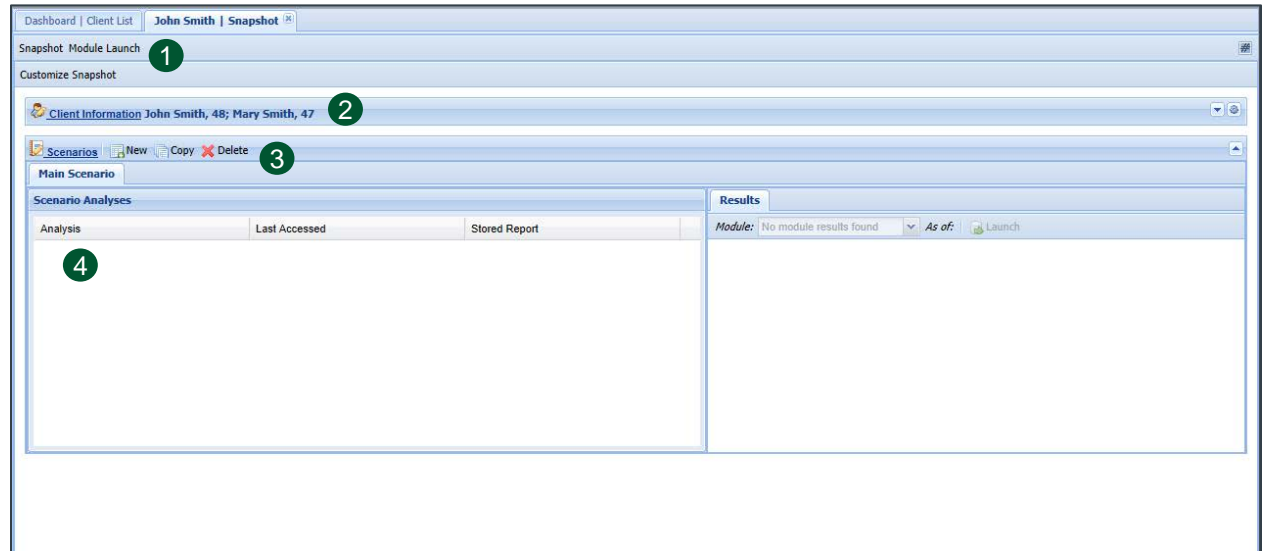
Best Practices

1. Only first name, last name, birth date and gender are required fields
2. Use the “Add Relationship” button to add additional relationships to the client or co-client. These additional relationships can then be used later when running certain modules
3. Information can be entered and modified on these screens. Modify additional relationships by using the “edit” or “delete” links
4. Click “Save” to save changes and exit this screen

Planning Calculators

Client Scenarios

1. Links to toggle between the client snapshot and the module selection screen
2. Information about the client and co-client you are working with
3. Ability to create, modify and delete client scenarios
4. Lists of previously run modules within the scenario



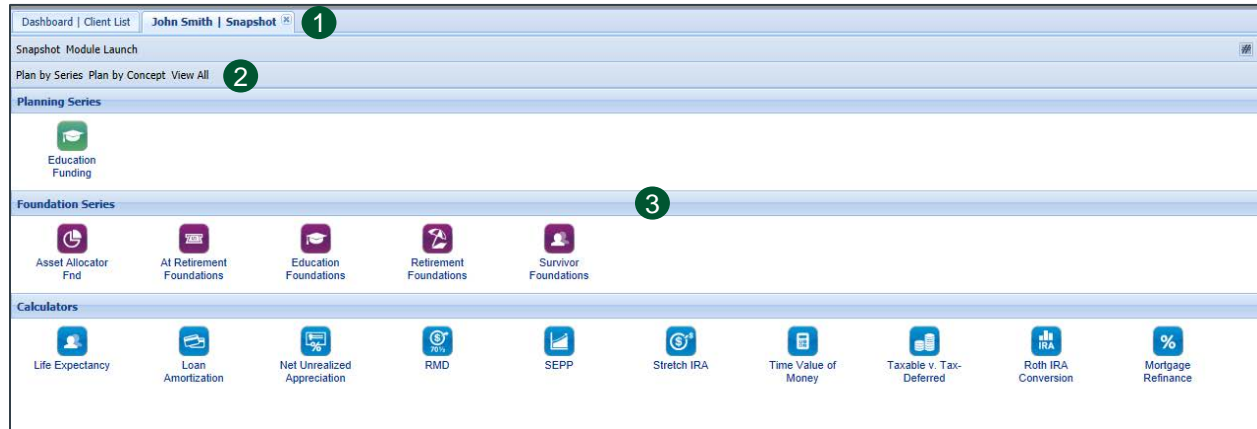
Best Practices

1. Clicking on “Module Launch” will bring up the list of available calculators and tools
2. Clicking the gear icon will allow you to modify information shown for the clients
3. Users can create and uniquely name multiple scenarios and then run modules based on those scenarios
4. The saved data entry points for certain modules will appear as quick links within the scenario analysis box that will let you launch back into that module with the data used previously

Planning Calculators

Calculator Modules

1. Tab indicates which client you are working with
2. Ability to sort modules by different means
3. Available modules will show here, grouped by series



Best Practices

1. Always make sure that you are working with the client you want to run the module for
2. Clicking on the module icon will launch that respective module
3. If you have previously run that module for that client within that client's scenario then the data previously entered will be maintained and will display within the module - it can then be modified as needed

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Calculator Workflow

1. Displays the scenario you are working within for that client as well as the module being used
2. The progressive steps for the respective module
3. Data entry for the selected module and on screen viewing of the results
4. Launches the “Create Report” screen to generate a client facing output

Best Practices

1. Clicking on “Questionnaire” will produce a printable form customized to the selected module that the user can utilize with their clients
2. The “Create Report” tab will pop a window where the user can customize the pages they would like to include in the generated PDF output
3. The “Concept” link explains the theory and logic for the module in question

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Report

1. The client(s) name will appear here
2. The user's name will appear here
3. The user's information will appear here

Best Practices

1. The user's information can be modified on the "Dashboard" tab and whatever information is entered will display here, on the report cover page

The screenshot shows a report cover page with the following content:

- Required Minimum Distributions**
- Prepared for:*
- 1** John and Mary Smith
- January 25, 2018
- Prepared by:*
- 2** GREGORY DAVIS
- 3** Fidelity Investments
100 Salem St O1S
Smithfield, RI 02917
617.563.8686
gregory.davis@fmr.com

At the bottom of the page, there is a navigation bar with icons for save, print, back, forward, page number (1 of 13), zoom in, zoom out, and a search icon.

Planning Calculators

Accessing Prior Calculations

1. Shows you which client you are working with
2. Shows you the scenario for that client you are currently in
3. Shows past modules that have been run for that client and date of last access

The screenshot displays the Fidelity Planning Calculators interface. At the top, there is a navigation bar with 'Dashboard | Client List' and a tab for 'John Smith | Snapshot' (marked with a green circle 1). Below this is a 'Snapshot Module Launch' section and a 'Customize Snapshot' area. The main content area shows 'Client Information John Smith, 48; Mary Smith, 47'. Below the client information is a 'Scenarios' section with 'New', 'Copy', and 'Delete' icons, and a 'Main Scenario' tab (marked with a green circle 2). The 'Scenario Analyses' section contains a table with columns for 'Analysis', 'Last Accessed', and 'Stored Report'. A single entry is visible: 'Stretch IRA' (marked with a green circle 3) with a 'Last Accessed' date of '01/25/2018'. To the right of the table is a 'Results' section with a 'Module: No module' dropdown.

Analysis	Last Accessed	Stored Report
Stretch IRA	01/25/2018	

Best Practices

1. Previously run modules can be quickly launched by clicking the link in the scenario analysis tab or by clicking “Module Launch” and then selecting the previously run module
2. If you have previously run a module for a client within that client’s scenario then the data previously entered will be maintained and will display within the module - it can then be modified as needed once the module is launched