

## SMART Portal – Client Guide

Congratulations! Your advisor has given you special online access to MoneyGuidePro (MGP) via SMART Portal. Each Advisor can customize SMART Portal to fit your needs and can change access at different stages of the planning process. At some stages you might be given access to enter information needed to create your plan, while at other times, you might only be asked to login and review specific information to discuss and provide feedback. Your advisor will provide guidance on what he/she needs from you.

### Accessing the SMART Portal

To begin using SMART Portal, just log in. Your advisor will provide you with a User ID and a temporary password. A unique website address for the SMART Portal login page will also be provided. For quick and easy access in the future, save the SMART Portal login page as a "favorite" or "bookmark" in your web browser.

When you access SMART Portal for the first time you will be asked to create your personal password (conforming to the requirements provided). Keep your login credentials in a safe place for future reference. If you forget or misplace your password, click the "forgot password" link OR contact your Advisor for further help.

### Navigating through SMART Portal

The page you first access when logging into SMART Portal is determined by your advisor. In most cases, you will land on the My Plans page which can be thought of as your homepage. From the My Plans page, you can access any plans or modules your advisor has given you access to.

Within a plan, you will have resources to guide you. SmartAlex™\*\* is your virtual guide who explains the important information you need to know about a given page. Clicking on the SmartAlex button on the right side of the page will open a small window and, when you click the play icon, SmartAlex will begin to "speak." You can view the SmartAlex text using the 'show text' link and pause, go back, and skip ahead using the controls provided. You can also skip to a different section of the page by clicking on the section headings.

In addition to guidance from SmartAlex, clicking on 'information bubbles,' indicated by question marks (?), provide explanations of specific terms and assumptions. The Help link at the top right of the screen displays "Help for this page" which provides additional detail about the page.

- To navigate to a section, use the links at the top (under the logo) and the left side of the screen to navigate. The page that you are currently on will be highlighted. Please refrain from using the back arrow/button on your browser.



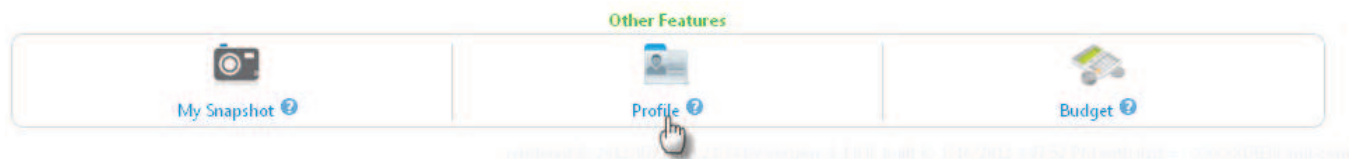
\*\*SmartAlex™ is a trademark of PIEtech, Inc., final registration pending.

- Click on item descriptions to “drill down” for more detail. To access a Plan, click on the Plan description (e.g., “Financial Freedom Plan”).

## My Plans

Name / Description	Date Created
<b>Financial Goal</b>	
<a href="#">Financial Freedom Plan</a>	10/19/2009

- To access a module, click on the link below the icon or the icon itself (e.g., Profile, Budget).



- When in a data screen, use the “Done” OR “Cancel” buttons located at the bottom of the page to save changes. In the absence of these buttons, just click on a left navigation link.
- When entering data, you may see a “Finished” link on the left side of your screen. Clicking this link notifies your advisor you have completed the information he/she requested.

### Financial Goal Plan:

▶ [Start / Personal](#)

[My Financial Goals](#)

[Resources](#)

[Risk Assessment](#)

[Finished](#)

