



Guide to Printing of Financial Planner Excel Version

Please note that the printing steps and results may vary and differ with different set ups of printers, computers, Microsoft Excel versions and Adobe Acrobat Reader versions.

This guide is prepared based on:

- PIAS office printer set up
- Microsoft Window 10 Pro Operating System
- Microsoft Excel 2016
- Adobe Acrobat Reader DC

Printing from Excel File



PROFESSIONAL INVESTMENT ADVISORY SERVICES

SETTING THE PROFESSIONAL STANDARD
FOR FINANCIAL ADVICE IN SINGAPORE

Financial Planner v2.9 - Excel

File Home Insert Page Layout Formulas Data Review View Developer Tell me what you want to do...

Cut Copy Paste Format Painter Clipboard

Font: Segoe UI Syml, 10, Bold, Italic, Underline, Color, Background Color

Alignment: Wrap Text, Merge & Center

Number: General, Currency, Percentage, Date, Time, Text, Fraction, Scientific

Styles: Conditional Formatting, Table

A1

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z AA AB AC AD AE AF AG

PIAS
PROFESSIONAL INVESTMENT ADVISORY SERVICES
PIAS is majority owned by Aviva Ltd

Financial Planner

Clear Current

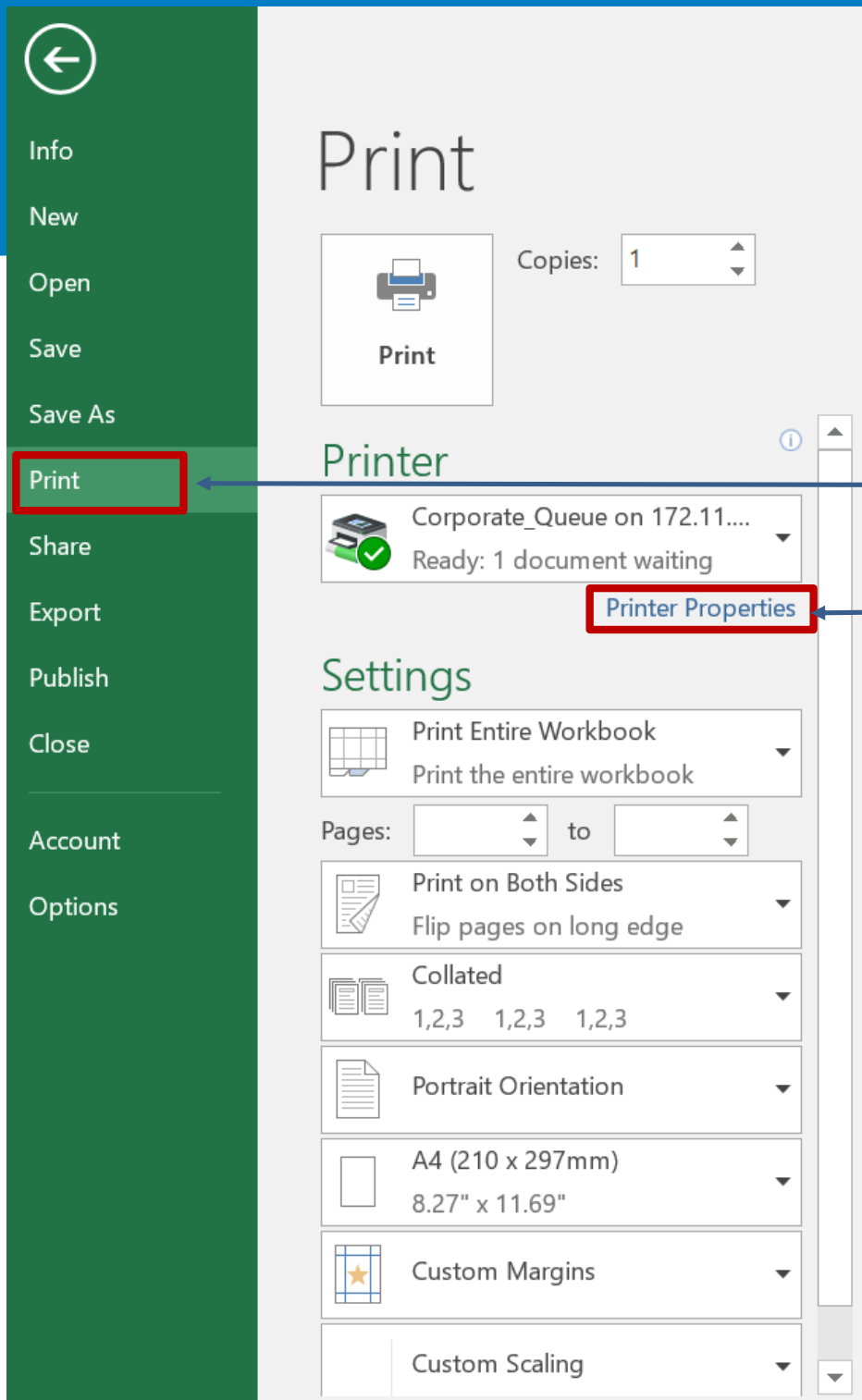
Clear ALL

1_CoverPage 2_Important Notice to Clients 3_Personal_Info 4_TI | Dependants 5_Fin Objectives 6_Cashflow

Ready Page: 1 of 4

1. Click on "File"

After opening the Excel FP



2. Select on "Print"

3. Click on "Printer Properties"

Under “Printer Properties”

\\172.11.0.15\Corporate_Queue Properties

Paper / Output Image Options **Layout** Watermarks Advanced Settings

Job Type:
Normal Print

2 Sided Print:
2 Sided Print

Paper Summary:
A4, Auto Paper Select(White)

Finishing Summary:
Collated

Paper Select...

Save... Edit...

Output Method:
Auto

Offset Stacking:
Offset per Set

Output Color:
Black & White

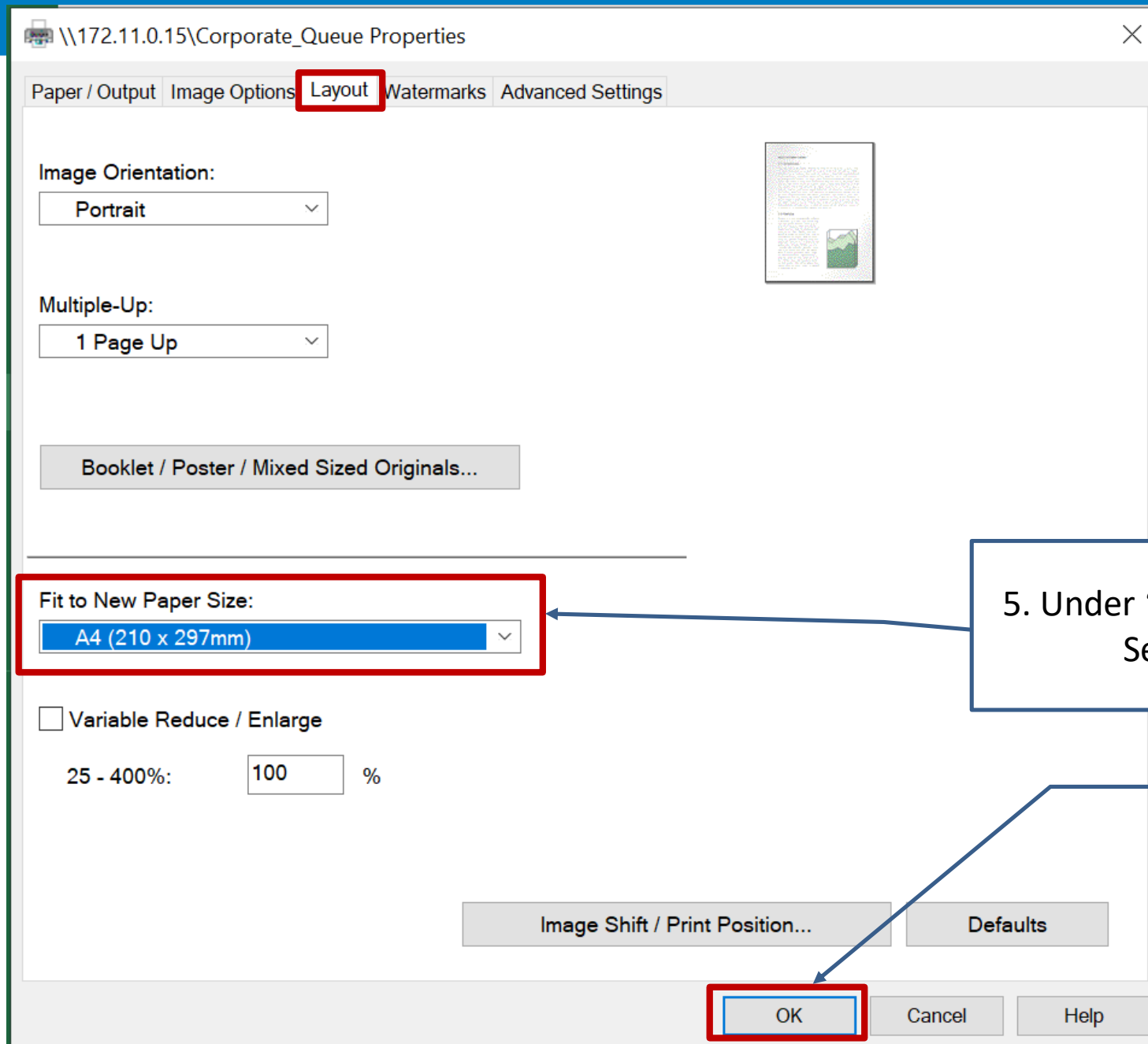
Quantity:
1

Status Defaults Default All

OK Cancel Help

4. Click on “Layout”

Under “Printer Properties”



5. Under “Layout”, “Fit to New Paper Size”,
Select “A4 (210 x 297mm)”

6. Click on “OK”



Info

New

Open

Save

Save As

Print

Share

Export

Publish

Close

Account

Options

Print



Copies: 1

Printer



Corporate_Queue on 172.11....

Ready: 1 document waiting

[Printer Properties](#)

Settings



Print Entire Workbook

Print the entire workbook

Pages: to



Print on Both Sides

Flip pages on long edge



Collated

1,2,3 1,2,3 1,2,3



Portrait Orientation



A4 (210 x 297mm)

8.27" x 11.69"



Custom Margins

Custom Scaling

Under "Print"

9. Click on "Print"

7. Select "Print Entire Workbook"

8. Select the referred settings



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Print

Copies: 1

Printer



Corporate_Queue on 172.11....

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[Printer Properties](#)

Settings



Print Entire Workbook

Print the entire workbook

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Print on Both Sides

Flip pages on long edge



Collated

1,2,3 1,2,3 1,2,3



Portrait Orientation



A4 (210 x 297mm)

8.27" x 11.69"



Custom Margins



Fit Sheet on One Page

Shrink the printout so that it f...

Under "Print" Optional Step

10B. Click on "Print"

*Optional step if the print out is still out of alignment, please select this setting.
10A. Select "Fit Sheet on One Page"*

Saving FP Excel version as PDF File



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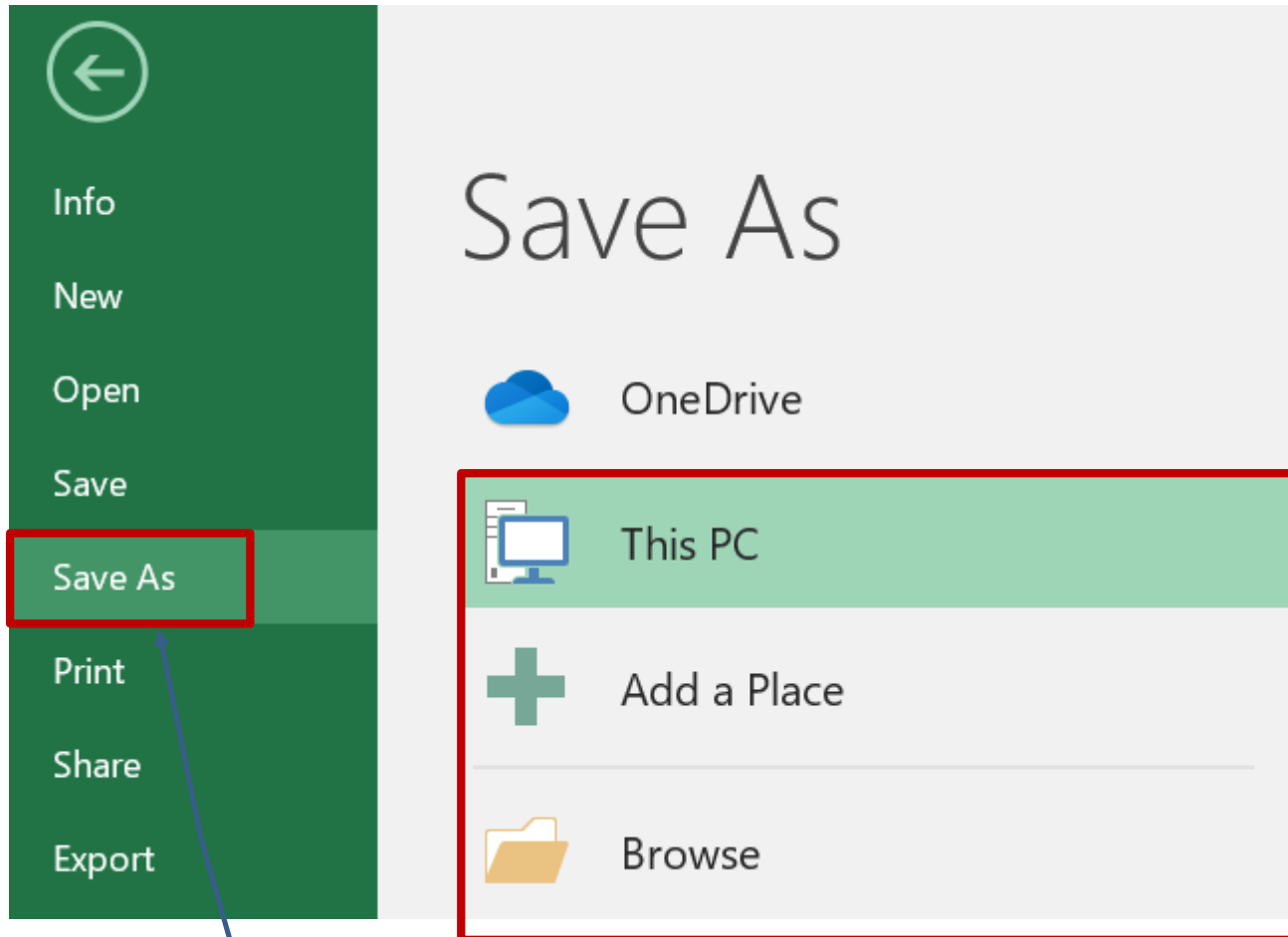
Clear Current
Clear ALL

Financial Planner

1_CoverPage 2_Important Notice to Clients 3_Personal_Info 4_TI | Dependants 5_Fin Objectives 6_Cashflow

Ready Page: 1 of 4

1. Click on "File"



2. Select "Save As"

3. Select the location to save the PDF file

4. Enter your referred File Name

5. Select “PDF” for “Save as type”

6. Select “Standard (publishing online and printing)”
7. Tick “Open file after publishing” to see the PDF saved (optional)

8. Click on “Options...”

The screenshot shows the 'Save As' dialog box in Microsoft Word. The file name 'Financial Planner v2.9' is entered in the 'File name' field. The 'Save as type' is set to 'PDF'. The 'Optimize for' section has 'Standard (publishing online and printing)' selected, and the 'Open file after publishing' checkbox is checked. The 'Options...' button is highlighted. The background shows a file explorer view of the 'Financial Planner' folder.

Name	Date modified	Type	Size
Financial Planner-v2.9 (PDF)	25-Jun-21 7:42 PM	Adobe Acrobat Docu...	1,071 KB
Financial Planner-v2.8 (PDF, Jiddah)	20-Jun-21 10:26 PM	Adobe Acrobat Docu...	1,888 KB
Financial Planner-v2.8A-W2F (PDF, Jiddah)	24-Jun-21 11:25 AM	Adobe Acrobat Docu...	1,537 KB

Under “Save As” | “Option”

Options ? X

Page range

☐ All

☒ Page(s) From: 1 To: 27

Publish what

☐ Selection ☒ Entire workbook

☐ Active sheet(s) ☐ Table

☐ Ignore print areas

Include non-printing information

☒ Document properties

☒ Document structure tags for accessibility

PDF options

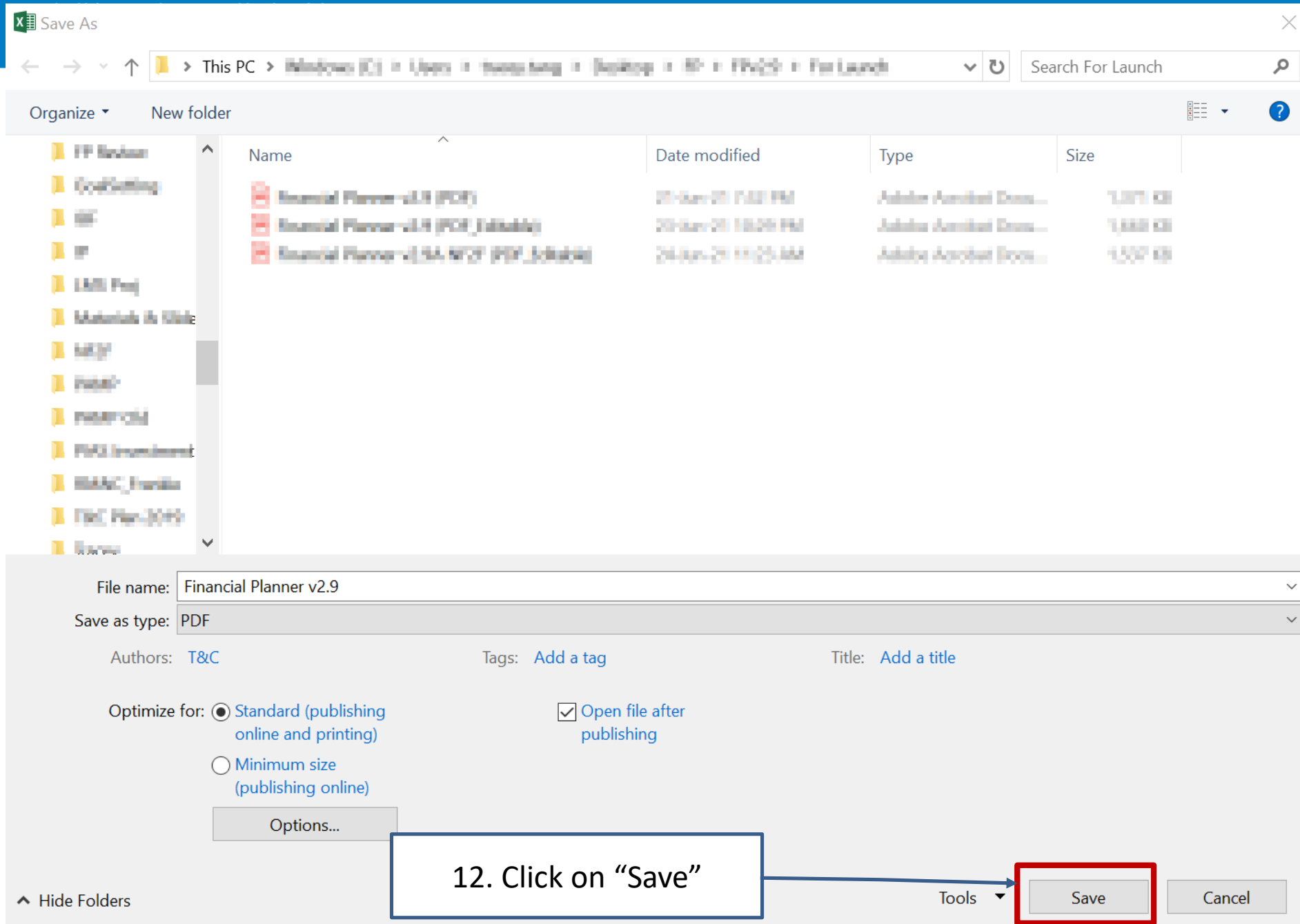
☐ ISO 19005-1 compliant (PDF/A)

OK Cancel

9. Select “Page(s)” and enter “1” & “27” as shown

10. Select “Entire workbook” under “Publish what”

11. Click on “OK”



If you need further enquiry on FP,
please email to training@pias.asia.

Thank you.



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