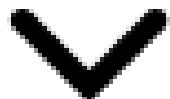


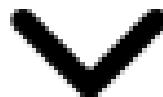
Yes



Yes

No

Married



Single

Married

Step 1 of 3

1 Client Profile

2 Contract Choices

3 Contract

Client Information

U.S. Citizen or Legal Permanent resident of the U.S.

No 

Primary Owner

First Name	Middle Initial (Optional)
<input type="text"/>	<input type="text"/>
Last Name	
<input type="text"/>	
Birthday (mm/dd/yyyy)	Gender
<input type="text"/>	<input type="text"/> Female 
Passport number	Alien # or Visa#
<input type="text"/>	<input type="text"/>
Marital Status	
<input type="text"/> Single 	

Contact Information

Email	
<input type="text"/>	
Address	Address Line 2 (Optional)
<input type="text"/>	<input type="text"/>
City	
<input type="text"/>	
State	
<input type="text"/> 	
Zip Code	
<input type="text"/>	

[Continue](#)[Cancel](#)

Step 1 of 3

1 Client Profile

2 Contract Choices

3 Contract

Client Information

U.S. Citizen or Legal Permanent resident of the U.S.

Yes 

Primary Owner

First Name	Middle Initial (Optional)
<input type="text"/>	<input type="text"/>
Last Name	
<input type="text"/>	
Birthday (mm/dd/yyyy)	Gender
<input type="text"/>	<input type="text"/> Female 
Social Security (***-**-****)	
<input type="text"/>	
Marital Status	
<input type="text"/> Married 	

Contact Information

Email	
<input type="text"/>	
Address	Address Line 2 (Optional)
<input type="text"/>	<input type="text"/>
City	
<input type="text"/>	
State	
<input type="text"/>	
Zip Code	
<input type="text"/>	

[Continue](#)[Cancel](#)

Step 1 of 3

1 Client Profile

2 Contract Choices

3 Contract

Client Information

U.S. Citizen or Legal Permanent resident of the U.S.

Yes 

Primary Owner

First Name	Middle Initial (Optional)
<input type="text"/>	<input type="text"/>
Last Name	
<input type="text"/>	
Birthday (mm/dd/yyyy)	Gender
<input type="text"/>	<input type="text"/> Female 
Social Security (***-**-****)	
<input type="text"/>	
Marital Status	
<input type="text"/> Single 	

Contact Information

Email	
<input type="text"/>	
Address	Address Line 2 (Optional)
<input type="text"/>	<input type="text"/>
City	
<input type="text"/>	
State	
<input type="text"/> 	
Zip Code	
<input type="text"/>	

 Submit Cancel

Step 1 of 3

1 Client Profile

2 Contract Choices

3 Contract

Client Fund WIP Choices

Client Profile
Successfully Created

Contract ID 1782734



Step 1 of 3

1 Client Profile

2 Contract Choices

3 Contract

Client Information

Spouse Information

Spouse First Name

Spouse Last Name

Spouse Email Address

Spouse SSN or Passport Number

Alien # or Visa#

[Submit](#)[Cancel](#)

Last Log In April 30, 2022

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Cancel Generate Contract

Do you want to save contract and finish later?

Discard

Save For Later

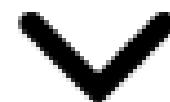
Yes



Yes

No

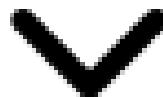
Female



Female

Male

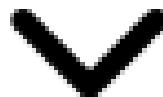
Married



Single

Married

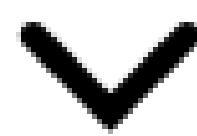
Married



Single

Married

State



AK

AL

AR

AZ

CA

CO

CT

DE



**Client Profile
Successfully Created**



Client ID 1782734

[Home](#)[Clients and Contracts](#)[Calculator](#)[FAQ](#)[How it Works](#)[Help & Support](#)

Welcome Dario!

Last Log In April 30, 2022

**Advisor start
New Contract****+ Start New Contract****Contract Summary**

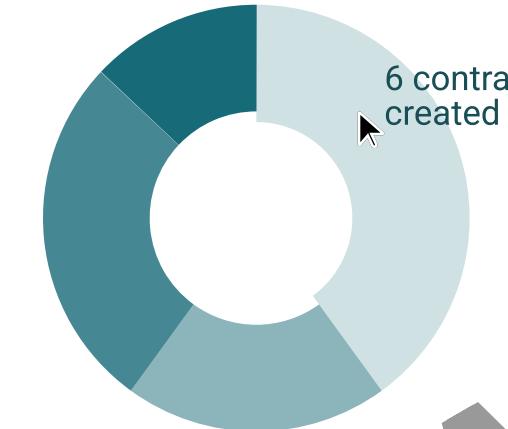
total 15 contracts

6 contracts created

3 contracts sent to client

4 contracts signed

2 contracts paid

**Notifications****3**

Fred Vos signed contract.

20mins ago

New client profile created successfully.

3hrs ago

Contract send to Joanne Scotty

1day

Pending Actions

Search

Contract ID ▾	FULL NAME ▾	FUNDS ▾	MODIFIED ▾	STATUS ▾
11790	Joey Fultron	\$70,000	6/28/2022 2:31pm PST	Created
62590	Joanne Scotty	\$50,000	4/28/2022 11:31pm PST	Signed
728394	Fred Vos	\$50,000	1/28/2022 11:31pm PST	Sent to Client



Step 1 of 3

1 Client Profile

2 Contract Choices

3 Contract

Client Information

U.S. Citizen or Legal Permanent resident of the U.S. Yes ▾

Marital Status Married ▾

What you need to creat client account

Each client account owner must be 18 or older and provide:

- Social Security or Passport number
- U.S. resident address
- Legal Name
- Birthday

[Continue](#)[Cancel](#)

Step 1 of 3

1 Client Profile

2 Contract Choices

3 Contract

Client Information

Primary Owner

First Name	Middle Initial (Optional)
<input type="text"/>	<input type="text"/>
Last Name	
<input type="text"/>	
Birthday (mm/dd/yyyy)	Gender
<input type="text"/>	Female <input type="button" value="▼"/>
Social Security (***-**-****)	
<input type="text"/>	

Contact Information

Email	
<input type="text"/>	
Address	Address Line 2 (Optional)
<input type="text"/>	<input type="text"/>
City	
<input type="text"/>	
State	
<input type="button" value="▼"/>	
Zip Code	
<input type="text"/>	

Spouse Information

Spouse First Name	Spouse Last Name
<input type="text"/>	<input type="text"/>
Spouse Email Address	
<input type="text"/>	
Spouse SSN or Passport Number	Alien # or Visa#
<input type="text"/>	<input type="text"/>

Step 1 of 3

1 Client Profile

2 Contract Choices

3 Contract

Client Information

Spouse Information

Spouse First Name

Spouse Last Name

Spouse Email Address

Spouse SSN or Passport Number

Alien # or Visa#

SubmitCancel

Option2
Separate Spouse Info

[+ Add Client](#)

Search

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Dario F.
Hightower Advisors

**PROSPECT NAME ▾** **FUNDING ▾** **AGE ▾** **GENDER ▾** **DATE SENT ▾** **STATUS ▾****Shawn Borsky**Initial Funding
\$20,000Payout Age
75Gender
Male3/28/2022
2:31pm PST**SENT****Shawn Borsky**Initial Funding
\$20,000Payout Age
75Gender
Male

Not Sent

DRAFT**Shawn Borsky**Initial Funding
\$20,000Payout Age
75Gender
Male

Not Sent

DRAFT**Shawn Borsky**Initial Funding
\$20,000Payout Age
75Gender
Male

Not Sent

DRAFT**Shawn Borsky**Initial Funding
\$20,000Payout Age
75Gender
Male

Not Sent

DRAFT**Shawn Borsky**Initial Funding
\$20,000Payout Age
75Gender
Male

Not Sent

DRAFT

Step 1 of 3

1 Client Profile

2 Contract Choices

3 Contract

Client Information

U.S. Citizen or Legal Permanent resident of the U.S. Yes ▾

Marital Status Single ▾

What you need to creat client account

Each client account owner must be 18 or older and provide:

- Social Security or Passport number
- U.S. resident address
- Legal Name
- Birthday

[Cancel](#)[Continue](#)

Prospect Planner

Enter the funding amount and payout age, see the benefits of our retirement plan.

[Home](#)[Clients](#)[Calculator](#)[FAQ](#)

WIP

PROSPECT PLANNER



Male



Female

Current Age

55

Avg. Return ⓘ

6%



Funding amount

\$100,000

\$150,000

\$200,000

\$1,000,000

80yo \$170,000 Savvly
\$114,000 Without Savvly

88yo \$170,000 Savvly
\$114,000 Without Savvly

90yo \$170,000 Savvly
\$114,000 Without Savvly

82yo
Savvly
Without Savvly

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Step 1 of 3

1 Client Profile

2 Contract Choices

3 Contract

Client Information

Primary Owner

First Name	Middle Initial (Optional)
<input type="text"/>	<input type="text"/>
Last Name	
<input type="text"/>	
Birthday (mm/dd/yyyy)	Gender
<input type="text"/>	<input type="text"/> Female ▾
Social Security (***-**-****)	
<input type="text"/>	

Contact Information

Email	
<input type="text"/>	
Address	Address Line 2 (Optional)
<input type="text"/>	<input type="text"/>
City	
<input type="text"/>	
State	
<input type="button" value="▼"/>	
Zip Code	
<input type="text"/>	

[Submit](#)[Cancel](#)

Step 1 of 3

1 Client Profile

2 Contract Choices

3 Contract

Client Information

Primary Owner

First Name	Middle Initial (Optional)
<input type="text"/>	<input type="text"/>
First name required	
Last Name	
<input type="text"/>	<input type="text"/>
Last name required	
Birthday (mm/dd/yyyy)	Gender
<input type="text"/> 12/30/2022	<input type="text"/> Female
Enter valid birth day	
Social Security (***-**-****)	
<input type="text"/> 999-99-9999	<input type="text"/>
Social security number required	

Contact Information

Email	Address	Address Line 2 (Optional)
<input type="text"/>	<input type="text"/>	<input type="text"/>
Enter valid email address to continue		
Address		
<input type="text"/>	<input type="text"/>	<input type="text"/>
Enter address to continue		
City		
<input type="text"/>	<input type="text"/>	<input type="text"/>
Enter city to continue		
State		
<input type="text"/> CA	<input type="text"/>	<input type="text"/>
Enter state to continue		
Zipcode		
<input type="text"/> 94538-9999	<input type="text"/>	<input type="text"/>
Enter zip code to continue		

[Next](#)[Cancel](#)

Step 1 of 3

1 Client Profile

2 Contract Choices

3 Contract

Client Fund WIP Choices

Client Profile
Successfully Created

Contract ID 1782734



Step 1 of 3

1 Client Profile

2 Contract Choices

3 Contract

Client Information

U.S. Citizen or Legal Permanent resident of the U.S.

No 

Marital Status

Single 

What you need to creat client account

Each client account owner must be 18 or older and provide:

- Social Security or Passport number
- U.S. resident address
- Legal Name
- Birthday

[Continue](#)

[Cancel](#)

Step 1 of 3

1 Client Profile

2 Contract Choices

3 Contract

Client Information

Primary Owner

First Name	Middle Initial (Optional)
<input type="text"/>	<input type="text"/>
Last Name	
<input type="text"/>	
Birthday (mm/dd/yyyy)	Gender
<input type="text"/>	<input type="text"/> Female ▾
Passport number	Alien # or Visa#
<input type="text"/>	<input type="text"/>

Contact Information

Email	
<input type="text"/>	
Address	Address Line 2 (Optional)
<input type="text"/>	<input type="text"/>
City	
<input type="text"/>	
State	
<input type="button" value="▼"/>	
Zip Code	
<input type="text"/>	

[Submit](#)[Cancel](#)

Step 1 of 3

1 Client Profile

2 Contract Choices

3 Contract

Client Information

U.S. Citizen or Legal Permanent resident of the U.S.

No 

Marital Status

Married 

What you need to creat client account

Each client account owner must be 18 or older and provide:

- Social Security or Passport number
- U.S. resident address
- Legal Name
- Birthday

[Continue](#)

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Step 1 of 3

1 Client Profile

2 Contract Choices

3 Contract

Client Information

Primary Owner

First Name	Middle Initial (Optional)
<input type="text"/>	<input type="text"/>
Last Name	
<input type="text"/>	
Birthday (mm/dd/yyyy)	Gender
<input type="text"/>	Female <input type="button" value="▼"/>
Passport number	Alien # or Visa#
<input type="text"/>	<input type="text"/>

Contact Information

Email	
<input type="text"/>	
Address	Address Line 2 (Optional)
<input type="text"/>	<input type="text"/>
City	
<input type="text"/>	
State	
<input type="button" value="▼"/>	
Zip Code	
<input type="text"/>	

Spouse Information

Spouse First Name	Spouse Last Name
<input type="text"/>	<input type="text"/>
Spouse Email Address	
<input type="text"/>	
Spouse SSN or Passport Number	Alien # or Visa#
<input type="text"/>	<input type="text"/>