

Dashboard View for Advisor

- System and first-time user messages appear above dashboard.
- Each widget is configurable for refresh interval and position.
- Compare current progress (New & Overall AUM) toward goals with rest of firm.
- Show break down of Accounts by Policy and Holdings by AUM.
- Graph widgets would have multiple views possible to allow personalization.

essentials

John Doe 

Print Correspondence Wizard Favorites Actions Reports

Workspace

Records and People Search

Advanced

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My Dashboard

Profile

Actions

Documents

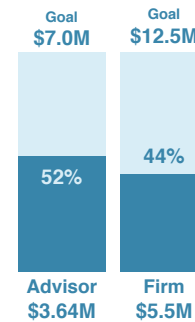
Financial

Opportunity

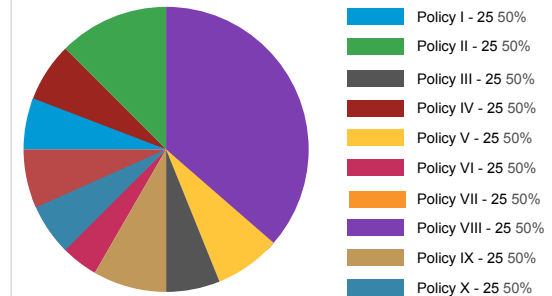
Planning

Welcome back! Some new stuff has been added since you visited last, take a look around and contact us if you have any questions.

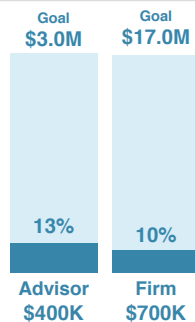
My Overall AUM



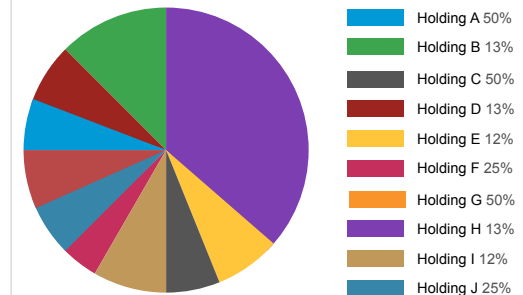
My Accounts by Policy



My New AUM



My Top Holdings by AUM





Dashboard View for Principle or Manager


- System and first-time user messages appear above dashboard.
- Each widget is configurable for refresh interval and position.
- Compare current progress of each advisor toward goals with rest of firm.
- Show break down of Accounts by Policy and Holdings by AUM.
- Graph widgets would have multiple views possible to allow personalization.


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John Doe 


Print



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