

Finansplan Pretotype – Advisory Model

STORYBOARD

October 2014





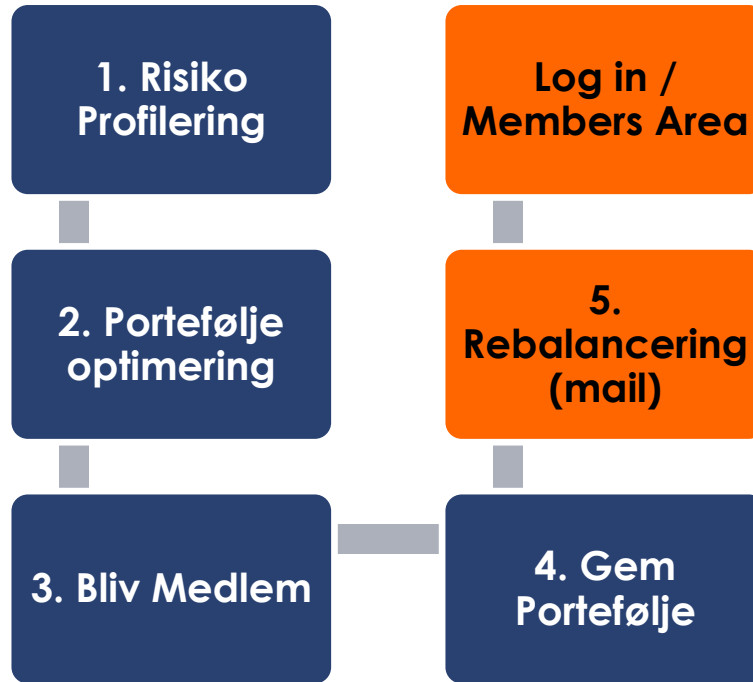
www.finansplan.dk

To-do's



- **Mødet er enten mandag 17/11 eller onsdag 19/11**
- **Kourosh**
 - ALGO præsentation
 - Rebalancering/webservice
- **Stig**
 - Storyboard
 - Tilbud præsentation
- **Michael**
 - Finansplan-branded pretotype (advisory model)

Storyboard – Advisory Model



Log In / Members Area



Portfolio

- Past performance
- Benchmark
- Future performance

Mailbox

- Pending mails
- Mail history

Members Area

Personal data

- Contact information
- Risk Profile

Documents

- Agreements

Mail / recommendation



Dear Member,

As requested we hereby advise you to rebalance your portfolio as follows:

Buy and Sell xxxxxx

Do you wish to save the Buy and Sell recommendations to your portfolio?

ACCEPT

DECLINE

Please remember that you need to trade the transactions yourself according to our mutual agreement.

Have a nice day,

Finansplan

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Performance

Zoom Live 1m 3m 6m YTD 1y All

Future eller past? = Past

Report data issue

	Today	1 year
Portfolio	Add an account	
S&P 500	-1.0%	15.3%
NETWORK BENCHMARKS		
My network	-0.7%	10.8%
Women (25-34)	-0.7%	8.9%
Media	-0.7%	14.5%

ASSETS MANAGED FOR FREE

\$20,000 Was is das für ein Ding?

1 Friend with funded account = Glem det - det er en rabat ordning

Get an additional \$5,000 managed for free!

Twitter Facebook LinkedIn Google+ Email

<http://wealth.fr/s/DcmZa> Copy Link

Thanks friend

36AR

APR

8/1/14

\$0.0K
\$0.0K
\$1.0K
\$10.0K

Skal vi integrere til sociale medier?

= smart hvis man kan overføre sine data fra LinkedIn f.eks.

ASSET CLASS	PERCENTAGE	ETF	MARKET VALUE	COST BASIS	RETURN
US Stocks	19.4%	VTI	\$10,104	\$10,119	-0.6%
Foreign Stocks	16.4%	VEA	\$8,541	\$8,471	0.9%
Emerging Markets	13.5%	WVO	\$7,031	\$6,907	7.0%
Dividend Stocks	14.8%	VIG	\$7,707	\$7,600	1.4%
Real Estate	12.7%	VNQ	\$6,606	\$6,426	4.9%
Corporate Bonds	21.2%	LQD	\$6,628	\$6,549	3.0%
Emerging Markets	12.7%	EM	\$6,628	\$6,549	3.0%
Cash why?	0.3%		\$153	\$153	
Overall Portfolio			\$51,993	\$51,317	2.4%

Nuværende portefølje?

Must - kunden skal kunne se detaljerne

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Rapporter i Log In / Members Area

wealthfront

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My SEP IRA

Went more risky. 4 out of 10 too low for my age.

Open a new account

SUMMARY | PLAN | TRANSACTIONS | DOCUMENTS

+ Add Funds | More

OVERALL VALUE

\$51,993

OVERALL RETURN

2.4%

ASSETS MANAGED FOR FREE

\$20,000

1 Friend with funded account

Get an additional \$5,000 managed for free!

Twitter | Facebook | LinkedIn | Google+ | Email

http://with.frf/jDcMz8 Copy Link

Thanks friend

Account Value

Compare: 05/07/14 REBALANCE (PROFILE CHANGED) Risk Tolerance: 4.0 → 7.0 More info

Hvad skal der være i venstre side når vi står på "Plan" fanebladet? = måske det svarer til vores faneblad "Personal data" som er kunde og kontaktdata og Risk profile

Investments

ASSET CLASS	PERCENTAGE	ETF	MARKET VALUE	COST BASIS	RETURN
US Stocks	19.4%	VTI	\$10,104	\$10,119	-0.6%
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Emerging Market Bonds	10.0%	EMB	\$5,223	\$5,093	4.3%
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Performance

Zoom Live 1m 3m 6m YTD 1y All

My Portfolio | SPY | My network | Women (25-34) | Media | QQQ

+20% | +15% | +10% | +5% | -5%

Sep, 13 | Nov, 13 | Jan, 14 | Mar, 14 | May, 14 | Jul, 14

Skal højresiden bevares eller hvad skal der være her? = højre siden er nogle forskellige benchmarks, vi kunne f.eks. Bruge benchmarks for obligationer og aktier i stedet for dette eksempel

Today | 1 year

Portfolio | Add an account

-1.0% | 15.3%

BENCHMARKS

brk	-0.7%	10.8%
25-34)	-0.7%	8.9%
Media	-0.7%	14.5%

Report data issue

September 30, 2011

Household Details

JOHN SMITH HH CL 12345

TIME-WEIGHTED PERFORMANCE

ASSET ALLOCATION

Equity (64.34%) | Fixed Income (31.08%) | Cash (4.58%)

CALENDAR YEAR RETURNS

	2011	2010
Household Return	11,416.80%	7.95%
Benchmark	-4.53%	6.24%
S&P 500	-8.68%	10.25%
BC Agg	6.65%	-1.30%
MSCI EAFE	-14.62%	6.19%
CPI	3.30%	0.34%

Insert logo here

Portfolio Snapshot

	QTD	YTD	Since Inception (10/01/2010)
Beginning Market Value	\$1,162,078	\$603,945	\$550,488
Net Contributions/Withdrawals	\$627	\$516,643	\$516,643
Income	\$5,309	\$12,077	\$14,711
Capital Appreciation	-\$102,381	-\$67,030	-\$25,207
Ending Market Value	\$1,065,634	\$1,065,634	\$1,065,634

Returns are net of fees. Since Inception return is annualized. Benchmark return is a blend of account level benchmarks unless otherwise noted as a specific benchmark or blend.

3 of 15

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http://with.frf/dcmZs Copy Link

Thanks friend

Account Value

Compare: 05/07/14

REBALANCE (PROFILE CHANGED)

Risk Tolerance: 4.0 → 7.0

More info

Her vil jeg vise datoerne for rebalancering af porteføljen hvis nogen = eller bare kontoens samlede værdi pr. dato over tid i linje og kanon hvis rebalanceringerne vises på dato som søjje

APR

5/6/14

Investments

ASSET CLASS

PERCENTAGE

ETF

MARKET VALUE

COST BASIS

RETURN

US Stocks

19.4%

VTI

\$10,104

\$10,119

-0.6%

Foreign Stocks

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VEA

\$8,541

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0.9%

Emerging Market Bonds

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Cash why?

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Investments

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My Portfolio | SPY | My network | Women (25-34) | Media | QQQ

DIA | AGG | GLD

+20%

+15%

+10%

+5%

0%

-5%

Sep, 13

Nov, 13

Jan, 14

Mar, 14

May, 14

Jul, 14

Report data issue

Portfolio

Add an account

S&P 500

-1.0%

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September 30, 2011

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TIME-WEIGHTED PERFORMANCE

Asset Allocation

Calendar Year Returns

Portfolio Snapshot

Household Return

Benchmark

S&P 500

BC Agg

MSCI EAFE

CPI

Beginning Market Value

Net Contributions/Withdrawals

Income

Capital Appreciation

Ending Market Value

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Cash (4.58%)

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http://with.frf/s/DCMZs Copy Link

Thanks friend

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Her vil jeg vise beskedder inkl. Dokumenter = kanon

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ENHANCEMENTS

My network -0.7% 10.8%

Women (25-34) -0.7% 8.9%

Media -0.7% 14.5%

I hele højre side vil jeg vise besked / dokumentdetaljer.

September 30, 2011

Household Details

JOHN SMITH HH CL 12345

TIME-WEIGHTED PERFORMANCE

Household Return (net) -8.35% 11,416.80% 12,331.94%

Benchmark -8.18% -4.53% 5.43%

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