AdvisorEnterprise℠ 2.0

Ashley Green

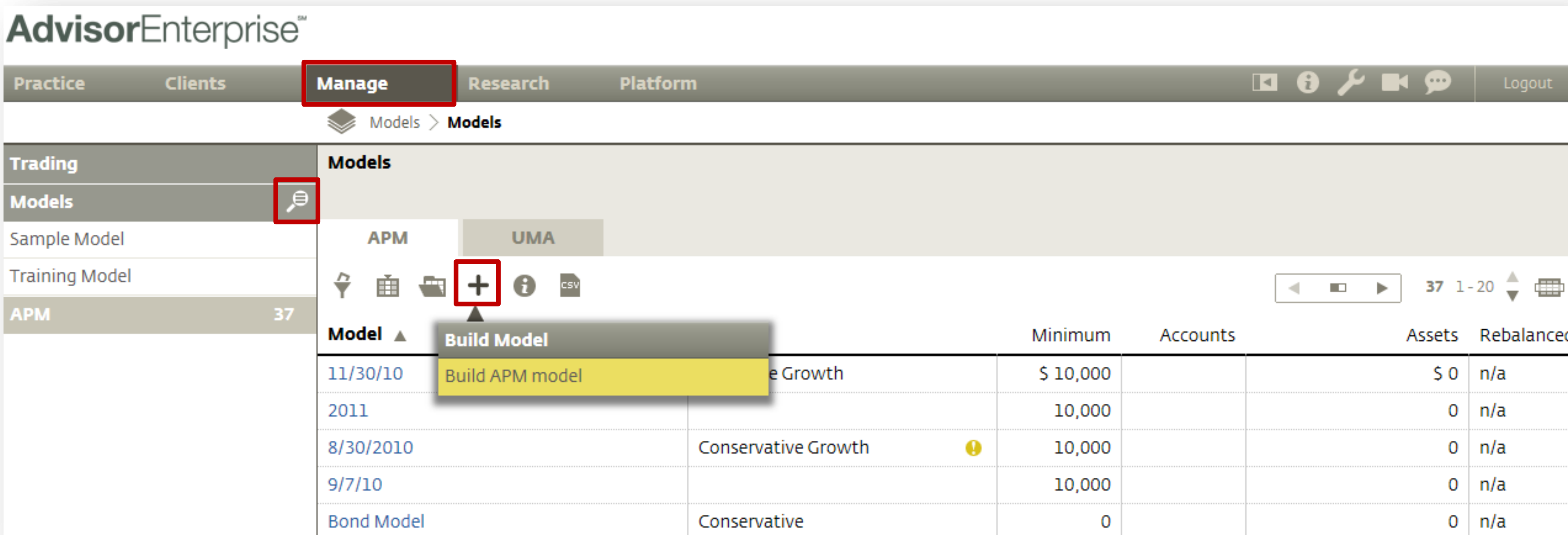
NFP Advisor Services Group

NFP Advisor Services Group

Rep as Manager

- Model Building
- Model Updates
- Custom Benchmarks
- Trading

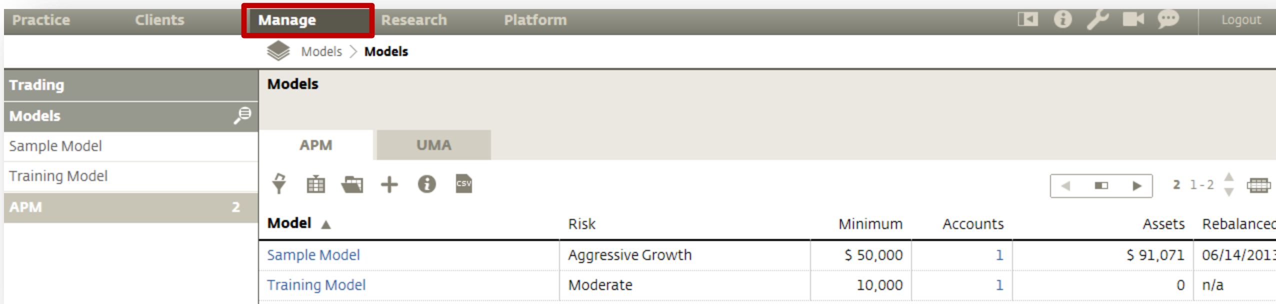
Rep as Manager: Building Models

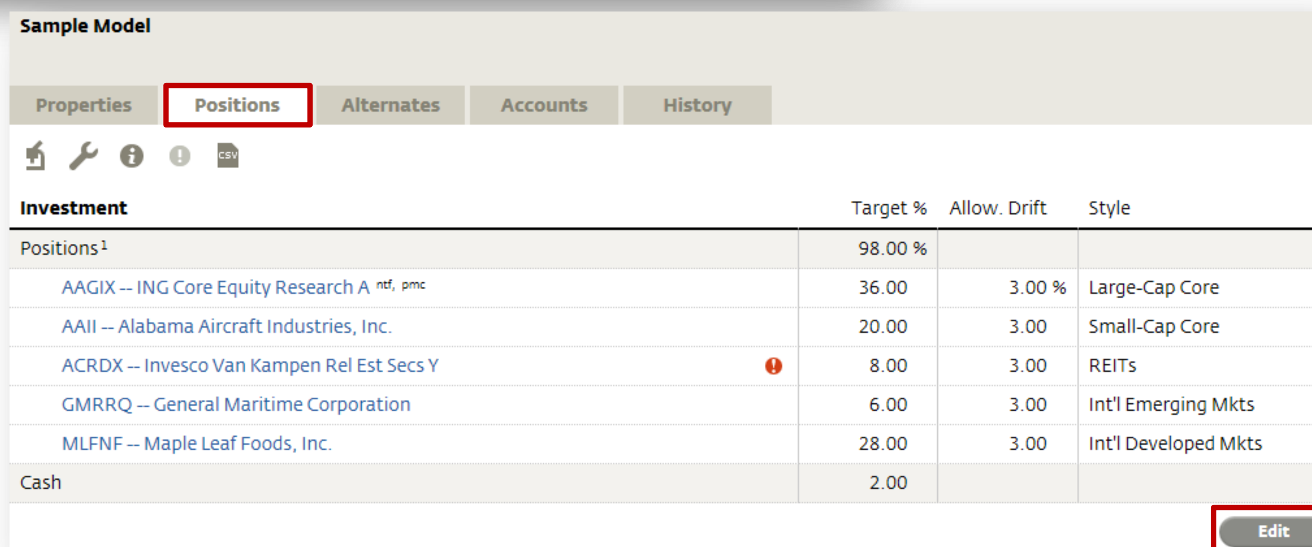


Risk Band Conversion Chart

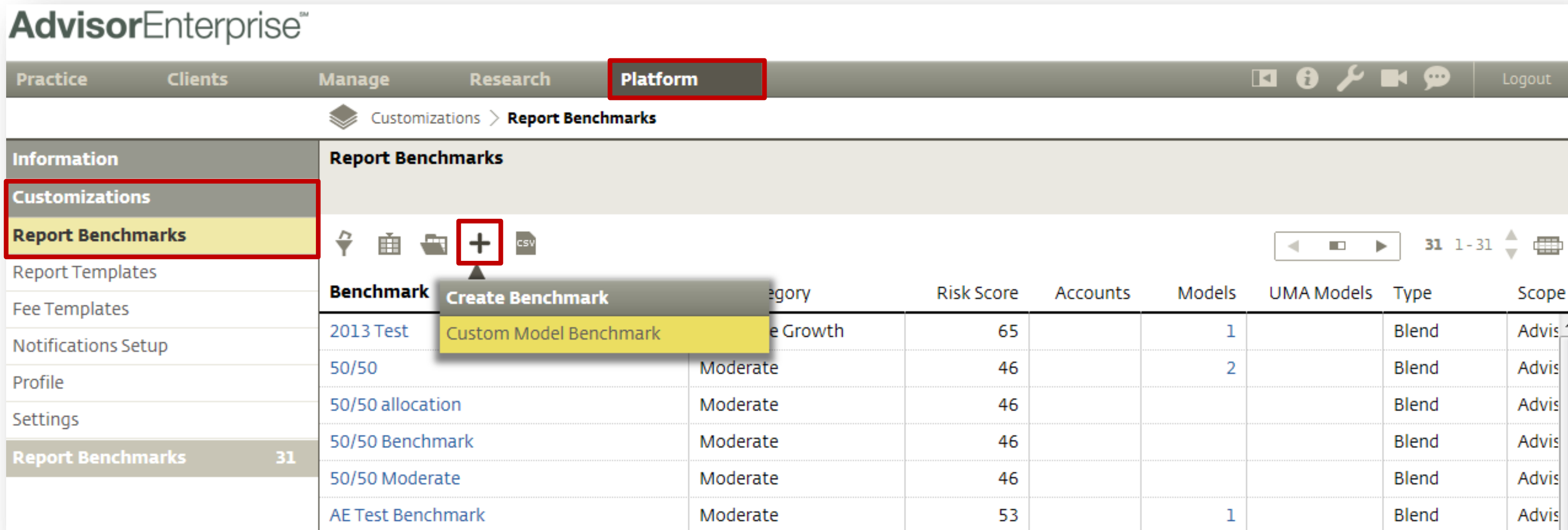
Advisor Enterprise Risk	Advisor Enterprise Risk Score	NFP Risk	NFP Risk Score
Capital Preservation	0-14	Conservative	0-43
Conservative	15-29	Conservative	0-43
Conservative Growth	30-43	Conservative	0-43
Moderate	44-57	Moderate	44-86
Moderate Growth	58-71	Moderate	44-86
Growth	72-86	Moderate	44-86
Aggressive	87-100	Aggressive	87-100

Rep as Manager: Model Updates

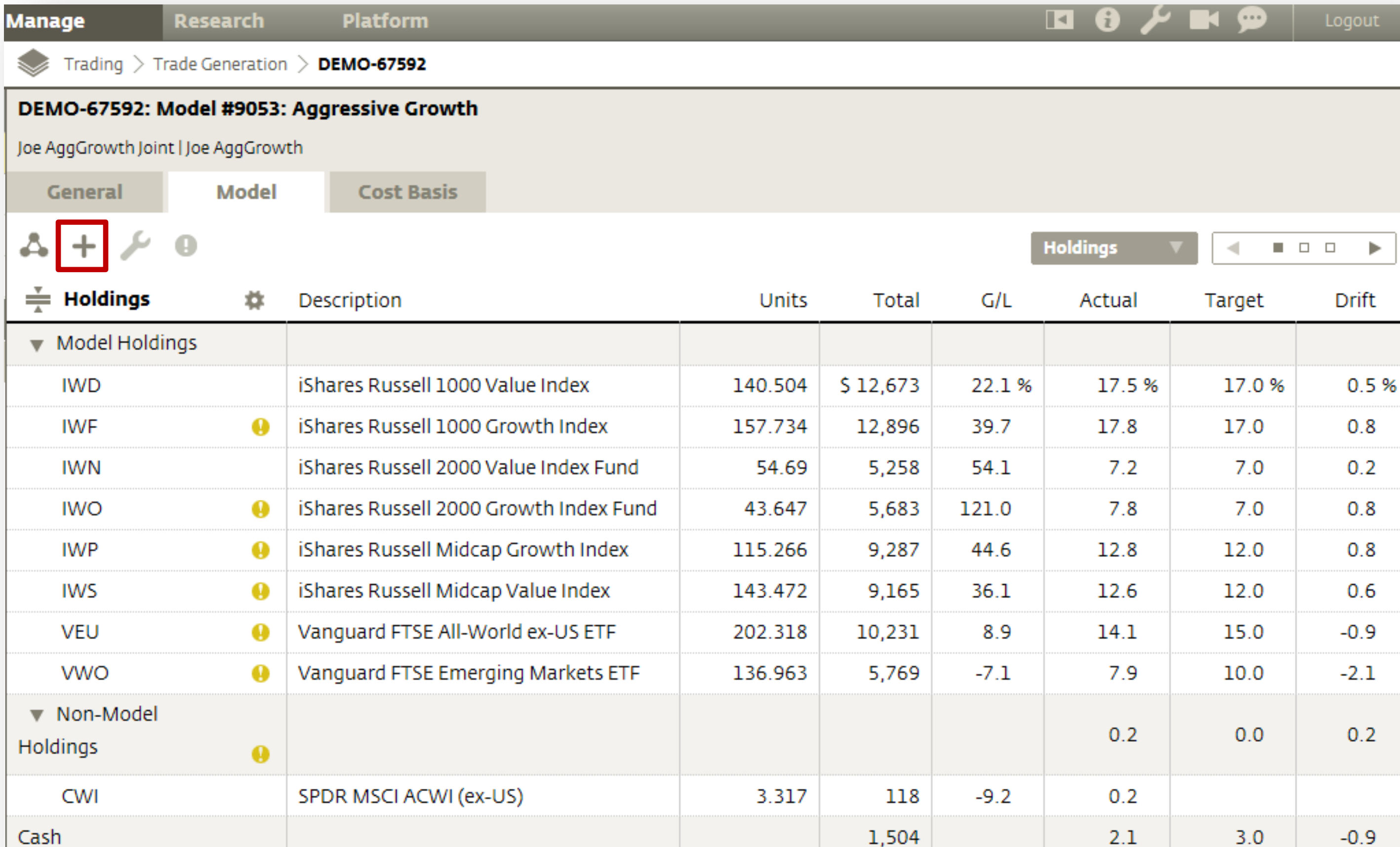




Rep as Manager: Custom Benchmarks

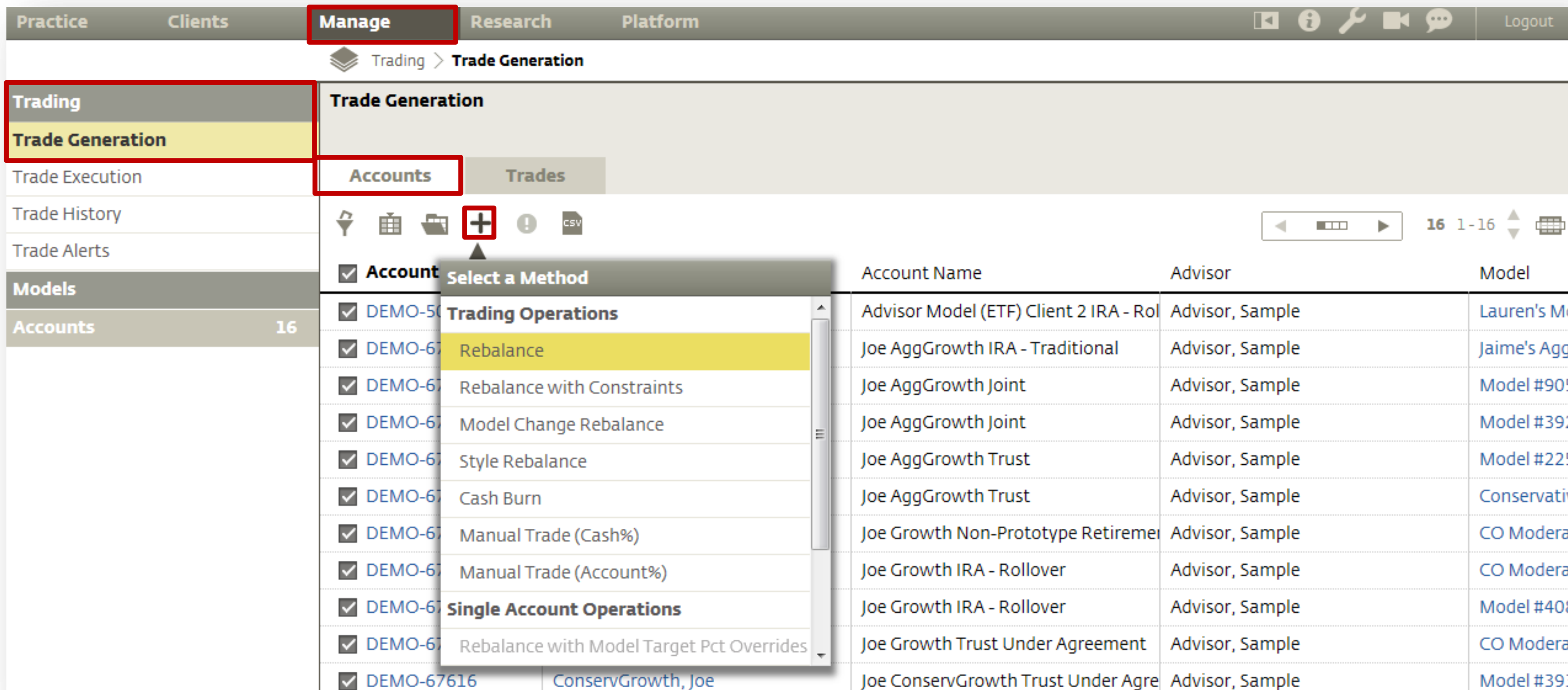


Rep as Manager: Account Level Trading



Holdings	Description	Units	Total	G/L	Actual	Target	Drift
Model Holdings							
IWD	iShares Russell 1000 Value Index	140.504	$ 12,673	22.1 %	17.5 %	17.0 %	0.5 %
IWF	iShares Russell 1000 Growth Index	157.734	12,896	39.7	17.8	17.0	0.8
IWN	iShares Russell 2000 Value Index Fund	54.69	5,258	54.1	7.2	7.0	0.2
IWO	iShares Russell 2000 Growth Index Fund	43.647	5,683	121.0	7.8	7.0	0.8
IWP	iShares Russell Midcap Growth Index	115.266	9,287	44.6	12.8	12.0	0.8
IWS	iShares Russell Midcap Value Index	143.472	9,165	36.1	12.6	12.0	0.6
VEU	Vanguard FTSE All-World ex-US ETF	202.318	10,231	8.9	14.1	15.0	-0.9
VWO	Vanguard FTSE Emerging Markets ETF	136.963	5,769	-7.1	7.9	10.0	-2.1
Non-Model Holdings					0.2	0.0	0.2
CWI	SPDR MSCI ACWI (ex-US)	3.317	118	-9.2	0.2		
Cash			1,504		2.1	3.0	-0.9

Rep as Manager: Trade Generation



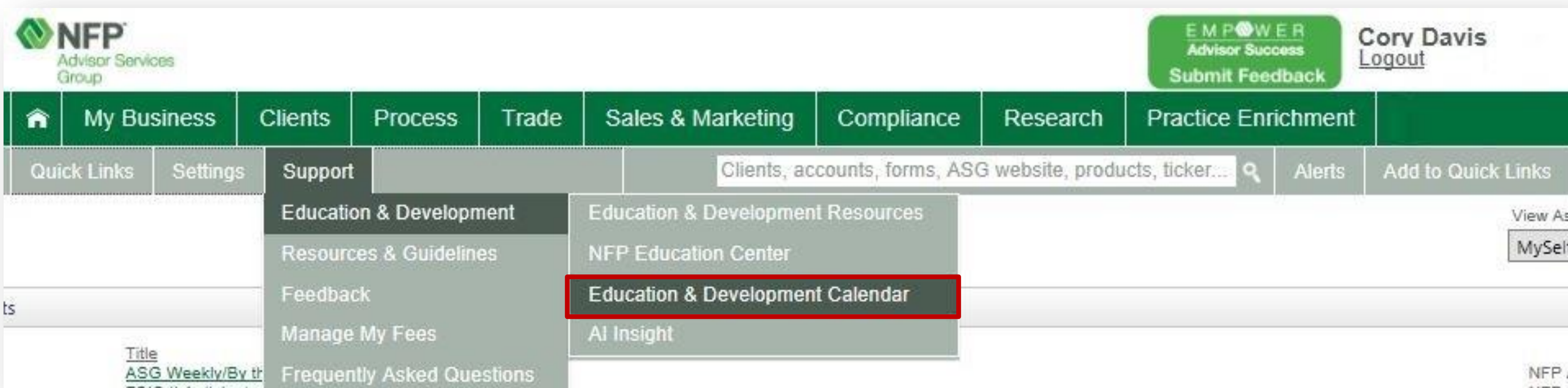
Rep as Manager

Questions?

NFP Advisor Services Group

Leadership. Innovation. Success.

Education and Development Calendar



Education & Development Calendar

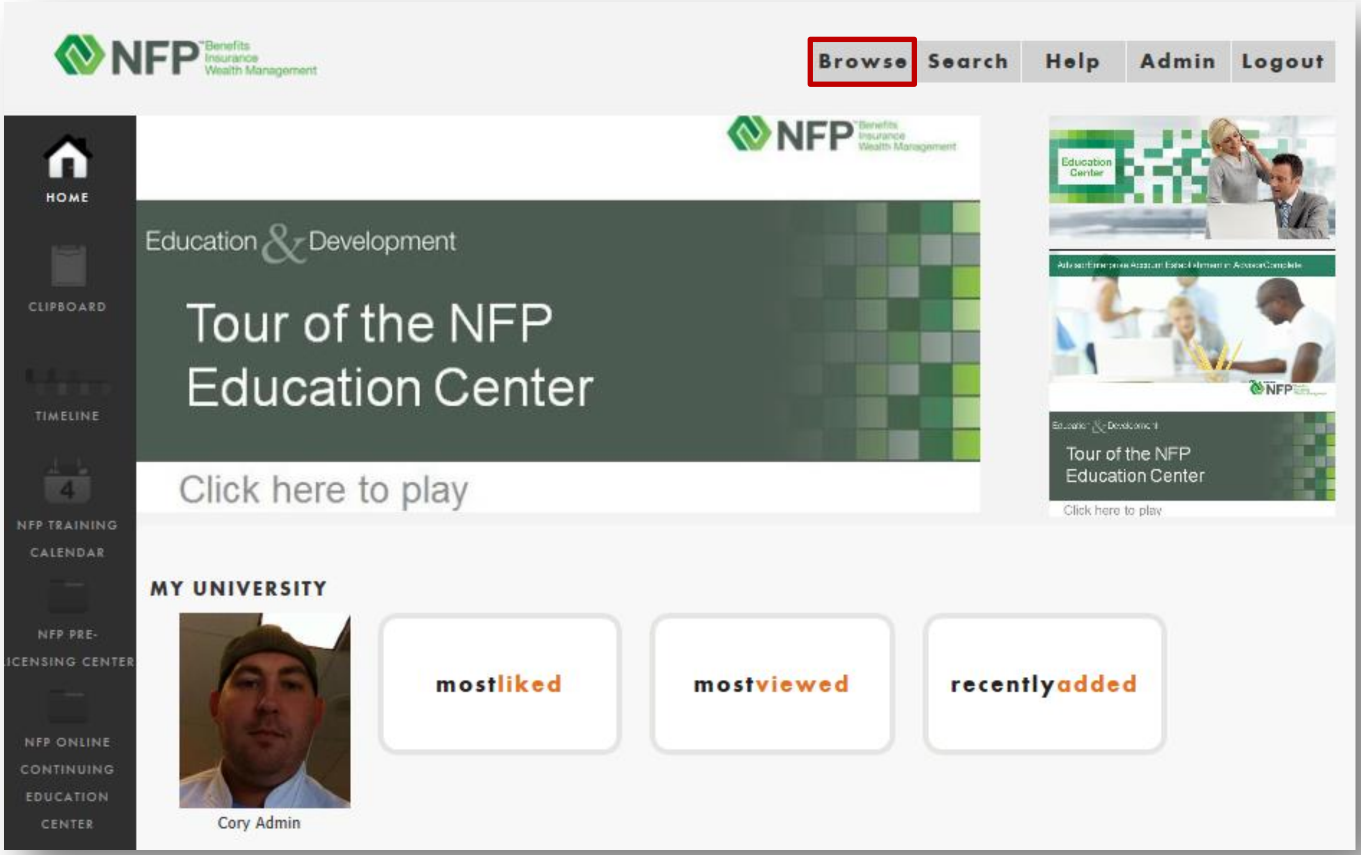
AdvisorEnterprise Series

March 2014

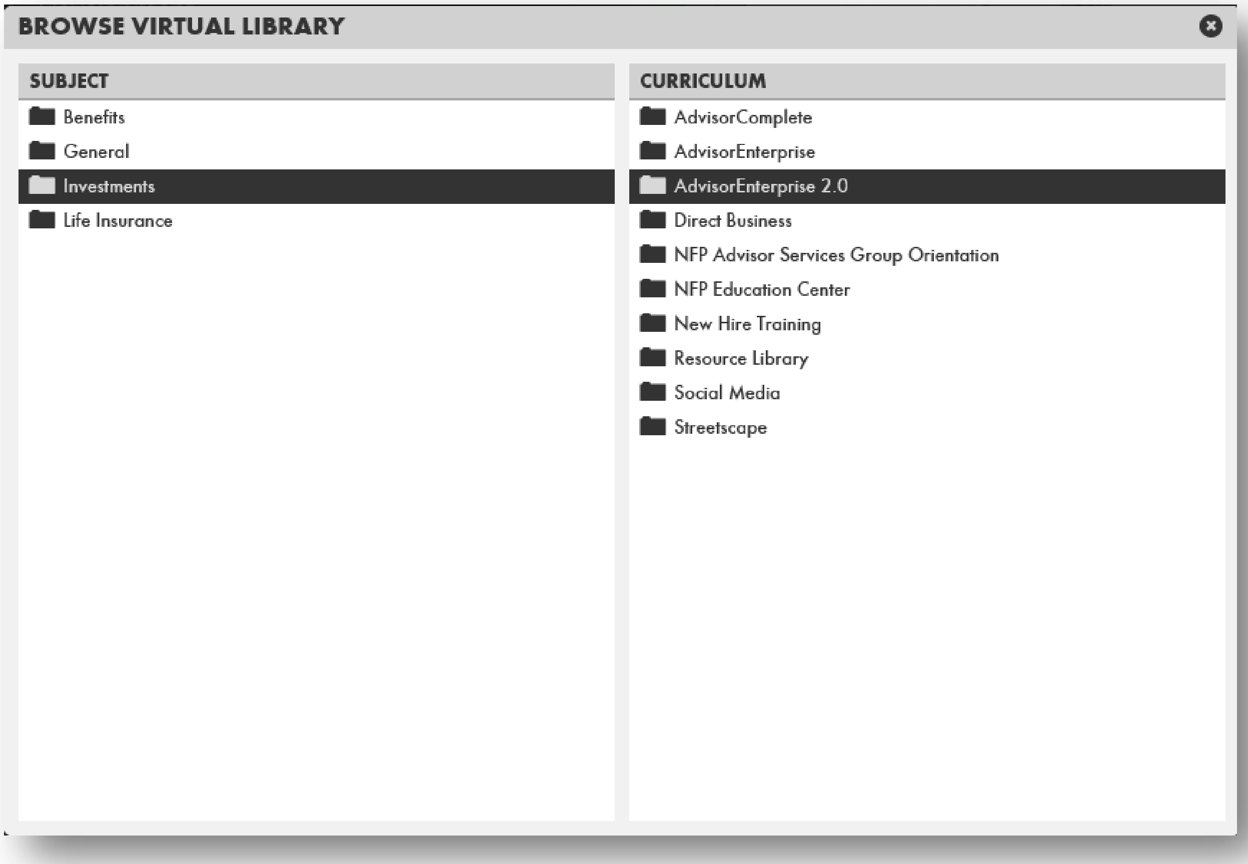
Mon	Tue	Wed	Thu	Fri
24	25 **10:00 - 11:00** AdvisorComplete Series: AdvisorEnterprise Business Processing	26 **2:00 - 3:00** NFP Advisor Services Group Monthly Compliance and Operations Call	27 **2:00 - 3:00** AdvisorEnterprise 2.0 Series: Income Solutions	28 **10:00 - 12:00** NFP360 Overview- Firm Facing
3	4 **2:00 - 3:00** AdvisorComplete Series: System Overview	5 **10:00 - 11:00** Best Practices Series: Surviving Tax Season	6 **10:00 - 11:00** AdvisorEnterprise 2.0 Series: Platform Overview **10:00 - 12:00** NFP360 Overview- Firm Facing	7
10	11	12	13	14
17	18 **2:00 - 3:00** AdvisorEnterprise 2.0 Series: Rep as Manager Building and Maintaining Models	19	20 **10:00 - 11:00** AdvisorComplete Series: Business Processing **10:00 - 12:00** NFP360 Overview- Firm Facing	21
24	25	26 **2:00 - 3:00** NFP Advisor Services Group Monthly Compliance and Operations Call	27 **10:00 - 11:00** AdvisorEnterprise 2.0 Series: Service Requests	28

NFP Education Center

NFP Education Center



NFP Education Center



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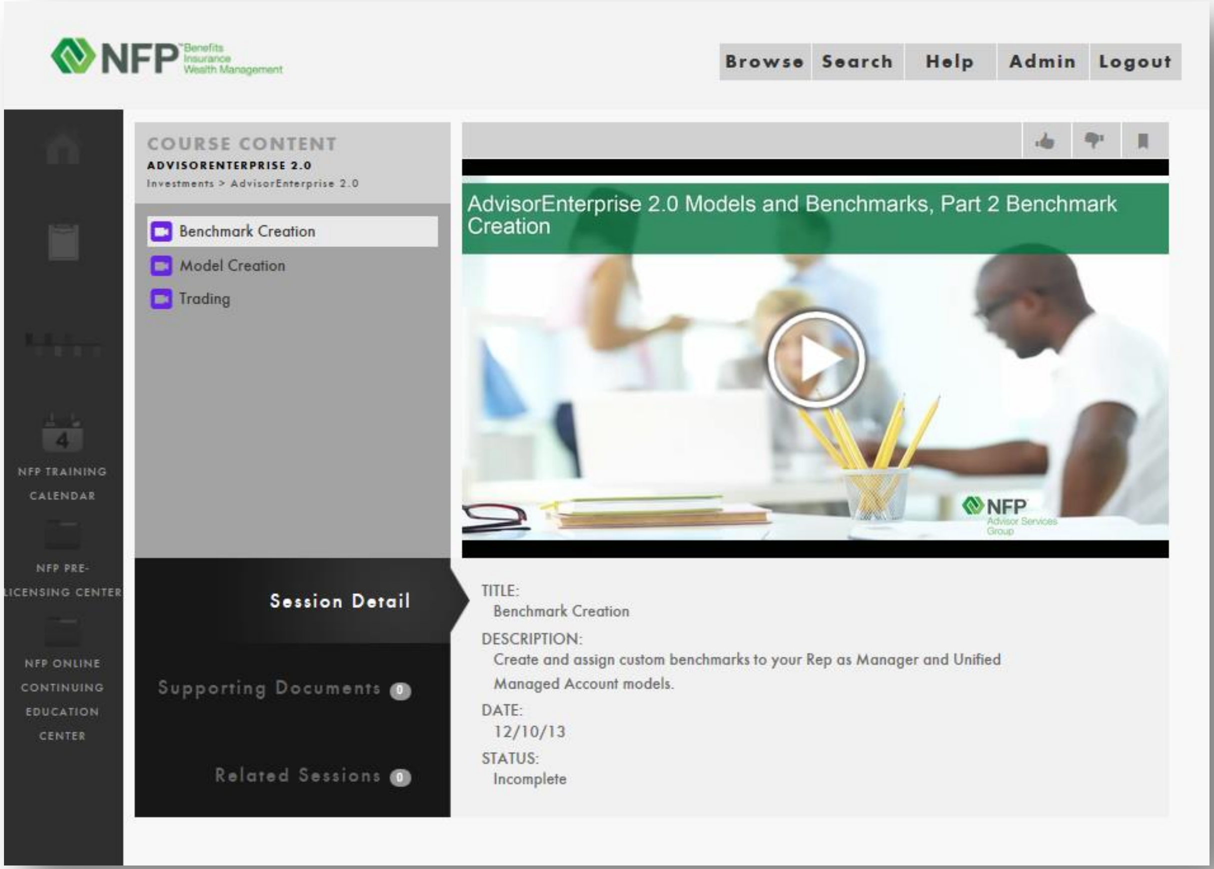
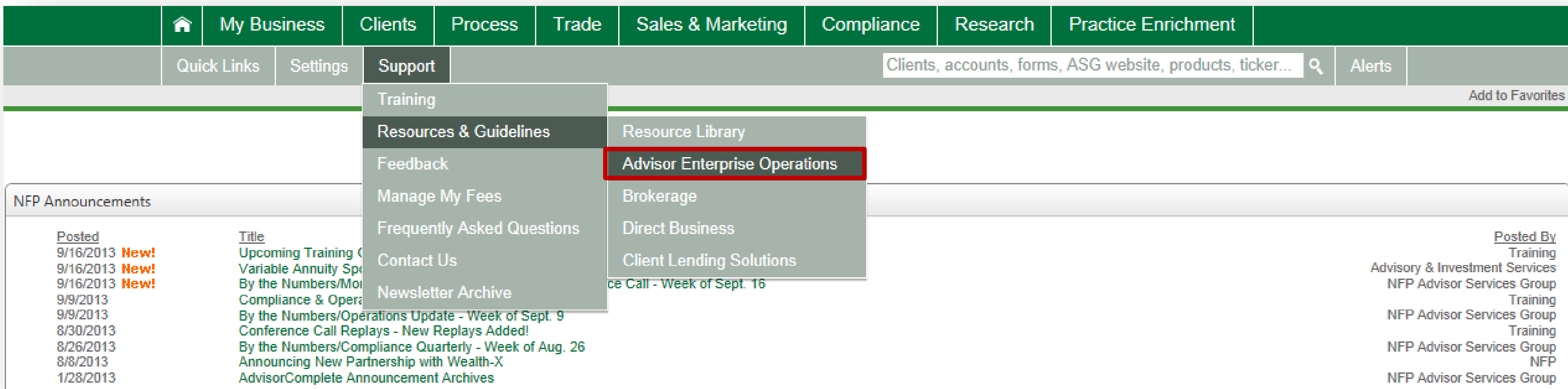


AdvisorEnterprise Operations



AdvisorEnterprise Operations

Advisory Support

Advisory team

Manager

Ashley Green

Specialist

Danny Klingler

Stephen Hester

Geoff Smith

Evan Golden

Ryan Timmins

Contact Advisory Support at 1-800-880-0080 Option 1, 4 or **AdvisoryOps@nfp.com.**