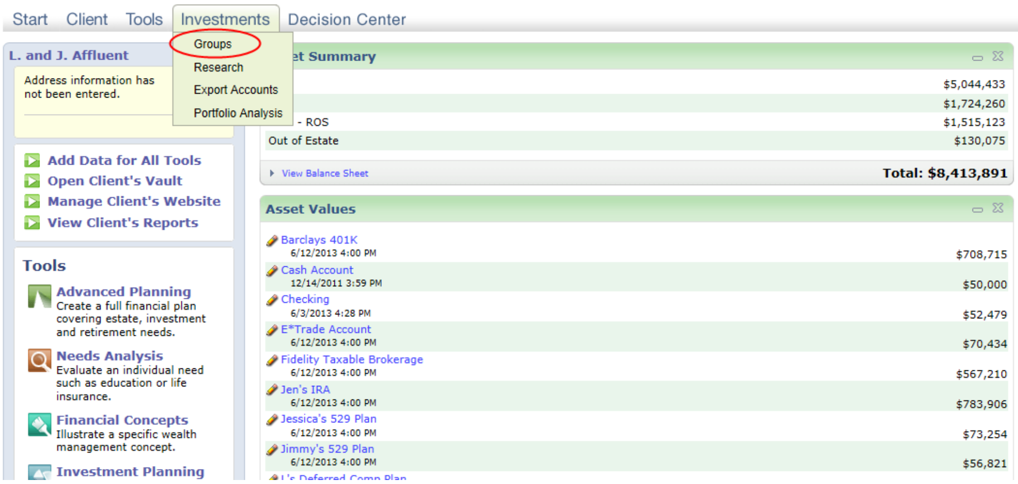
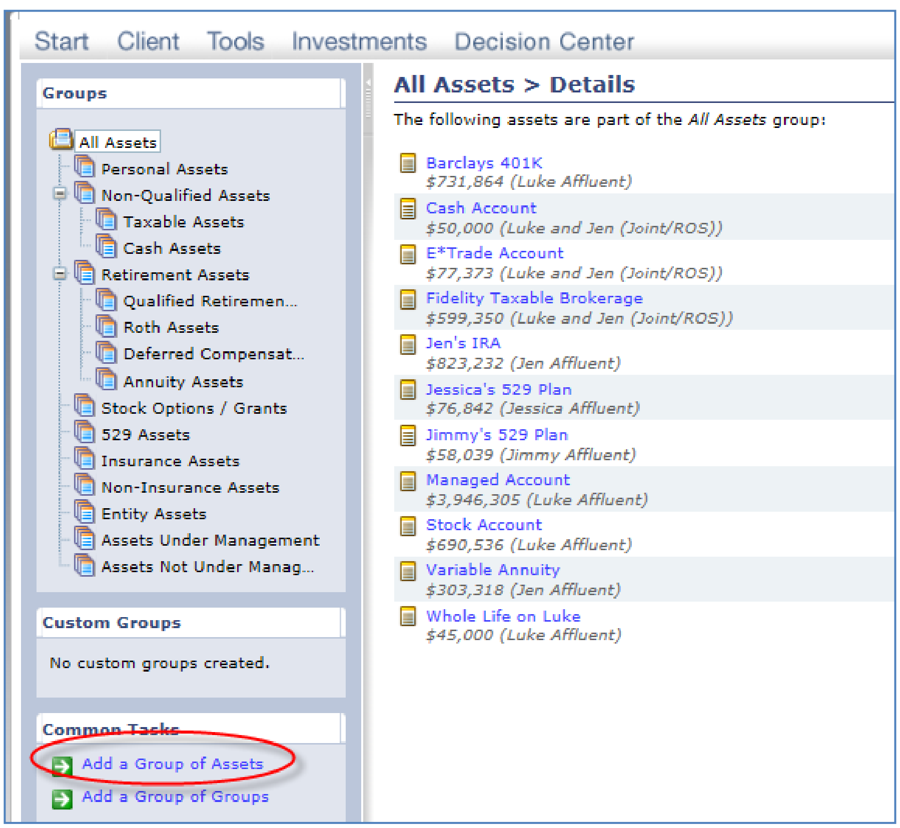
In this training guide, we will demonstrate how to set up investment groups. Investment grouping displays all the applicable client investments under the corresponding default investment group.

1. From the **Client Dashboard,** select **Investments** and choose **Groups.**



2. To create a **Custom Group of Assets**, click **Add a Group of Assets.**

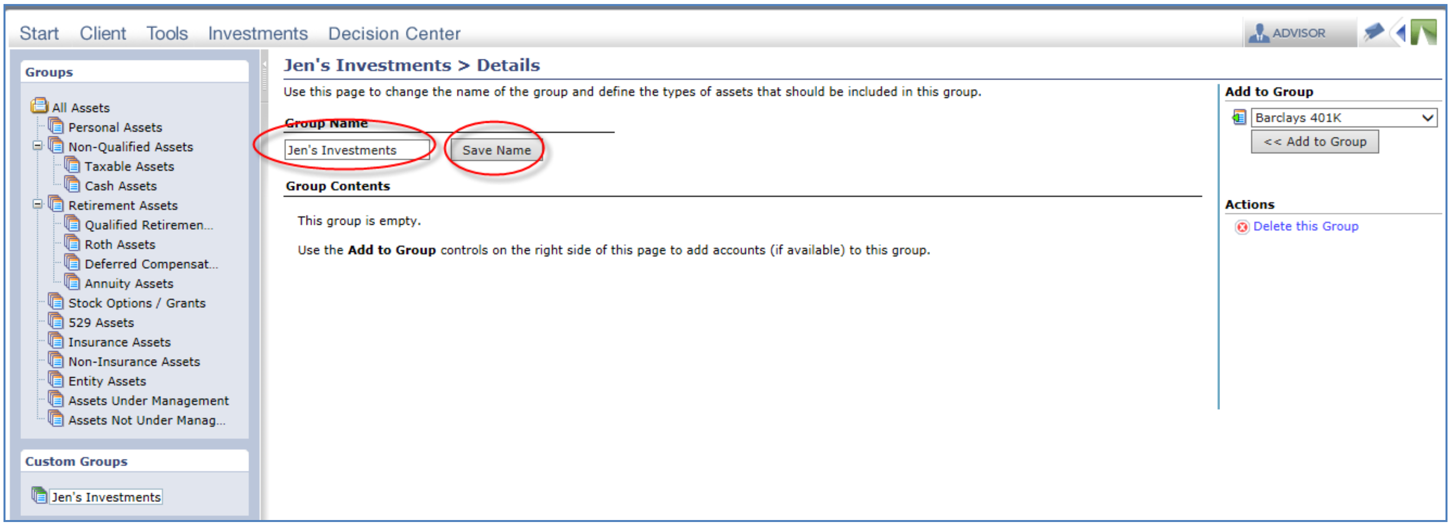


Please Note:

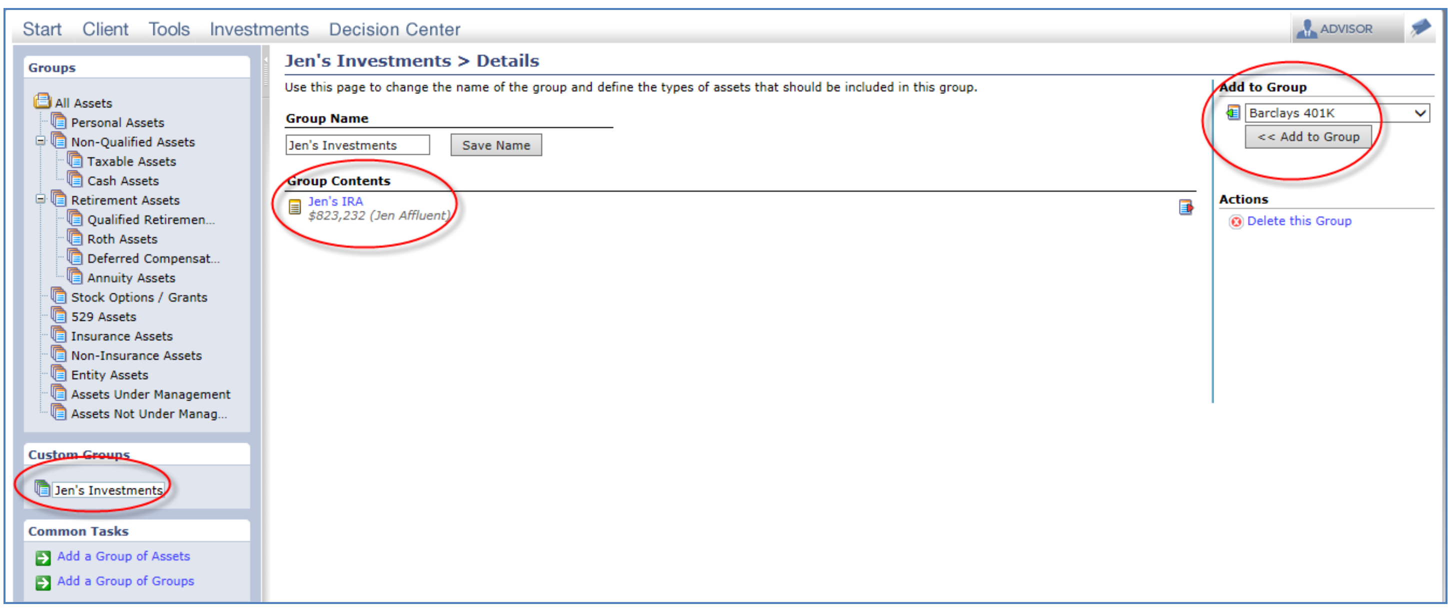
Default groups are: Non-Qualified, Stock Options/Grants, Qualified, Roth Assets, 529 Assets, Annuity Assets, Deferred Compensation Assets, Insurance Assets, Non-Insurance Assets, Assets Under Management, and Assets Not Under Management.

***Custom Groups** can be created. You can create a group made up of specific investment assets, or a group made up of built in investment groups.*

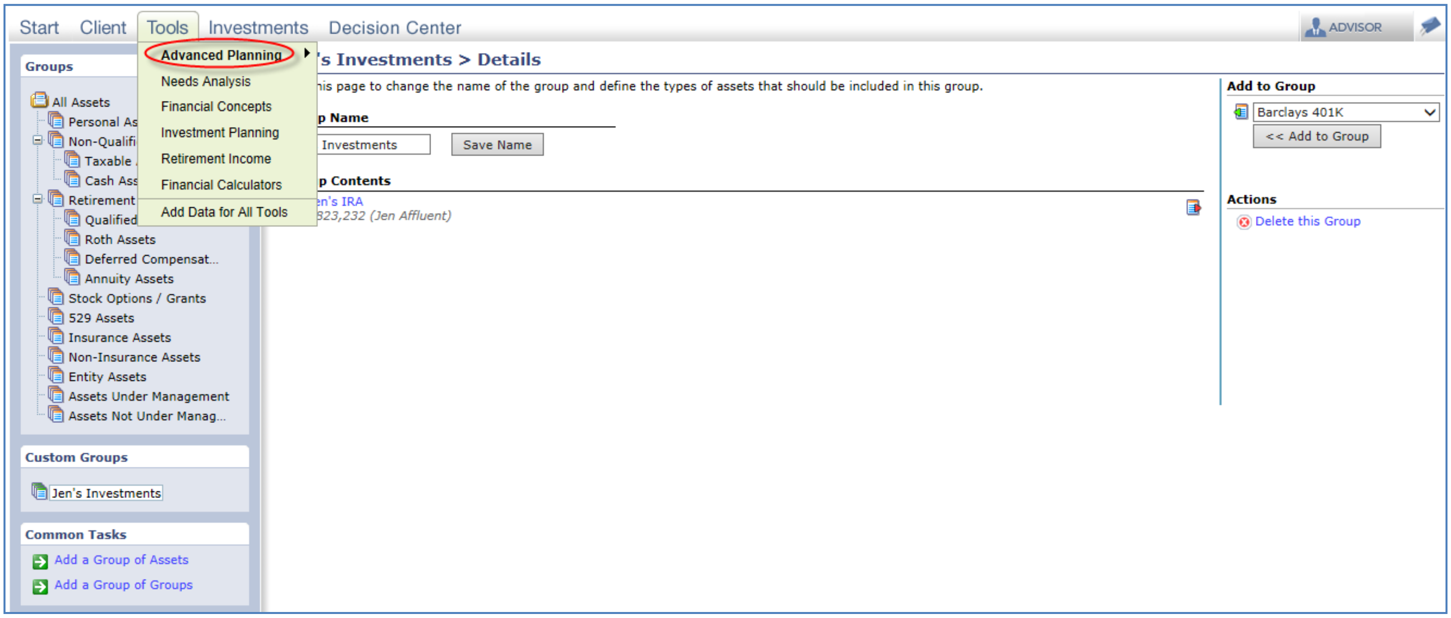
3. Enter the group name and click **Save Name.**



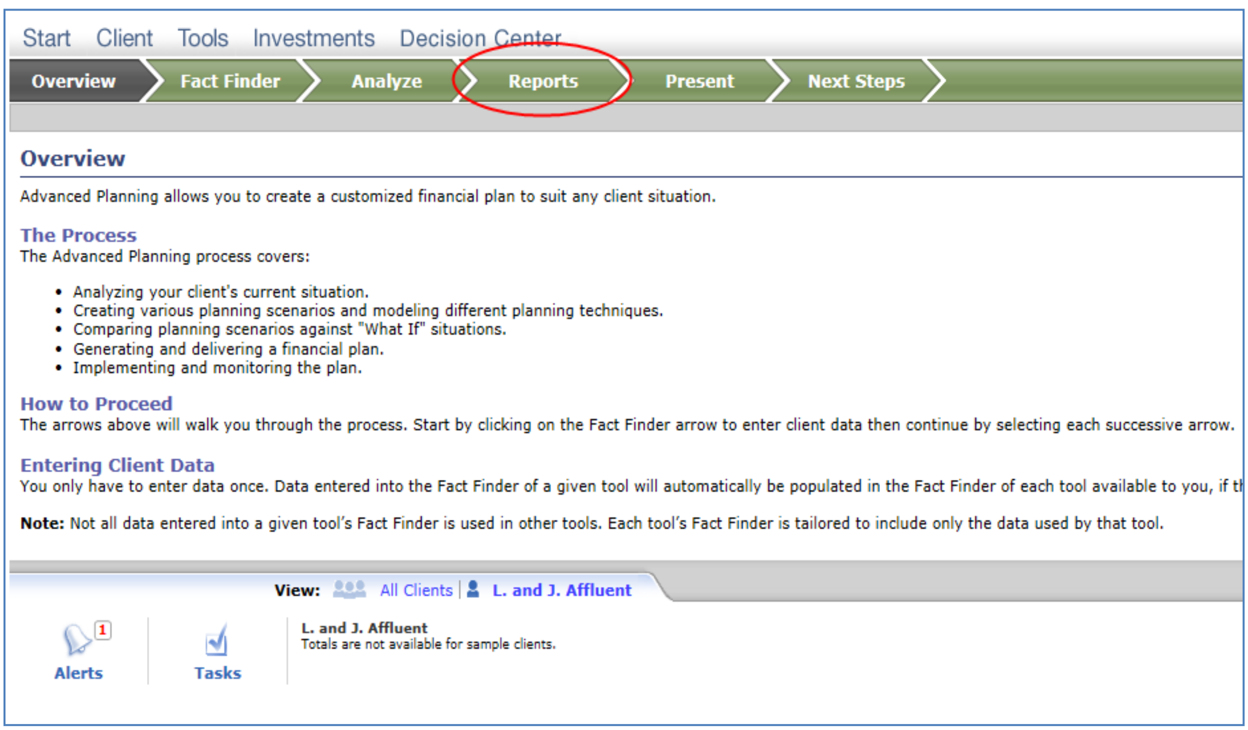
4. Select the Assets to include and click **Add to Group.**



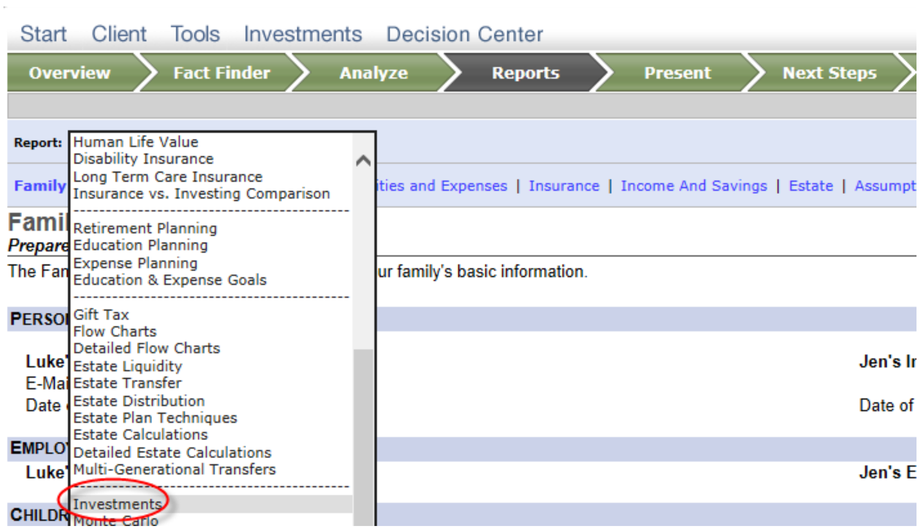
5. Select **Advanced Planning.**



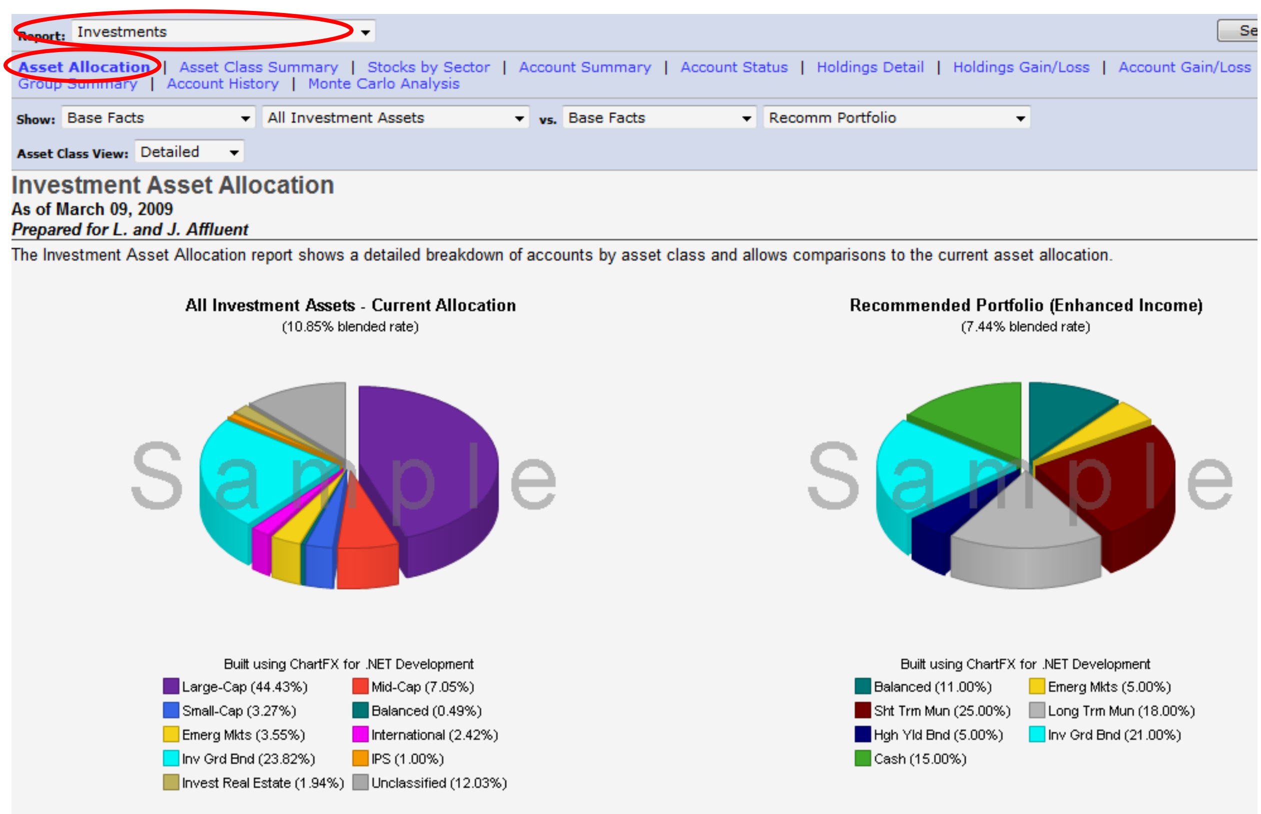
6. Select **Reports.**



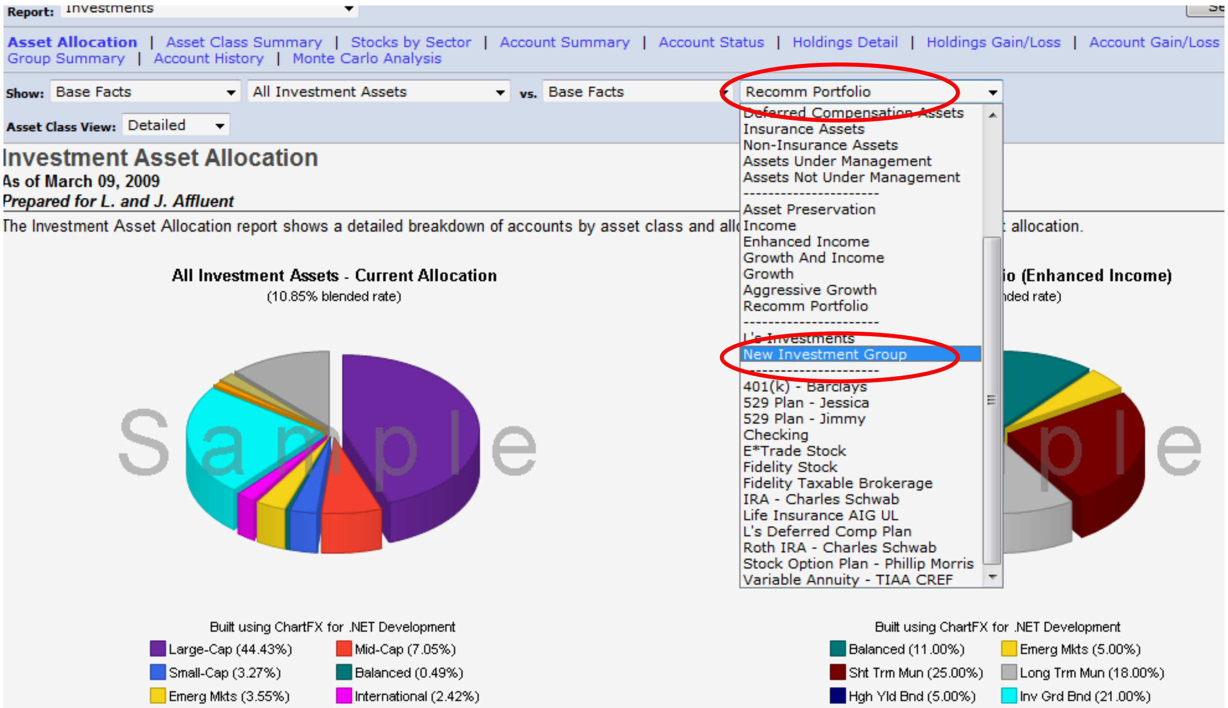
7. From the **Reports** Dropdown, select **Investments.**



8. Click the sub-report titled **Asset Allocation.**



The **Investment Asset Allocation** report shows a detailed breakdown of accounts by asset class and allows comparisons to the current asset allocation. View the custom group from the **Recommended Portfolio** dropdown to compare the Custom Group to other portfolios.



The center of this screen shows the **Custom Group** vs. **All Investment Assets**