BrokersFinancial | Business Builder®

ADVISOR TRAINING GUIDE

What is Business Builder? With Business Builder, Brokers Financial's new business management hub, you get instant access to the market news, business data and personalized insights you need to run your day and help your business grow.

LOGIN PROCESS

When your account is ready, you'll receive two emails from **businessbuilderinfo.com**. **Please note:** one or both of these emails may get caught in your spam folder, so you'll want to make sure to check it.

The first email has a "Register Now" link at the bottom. Follow the prompts in that link to confirm your username and set your password.

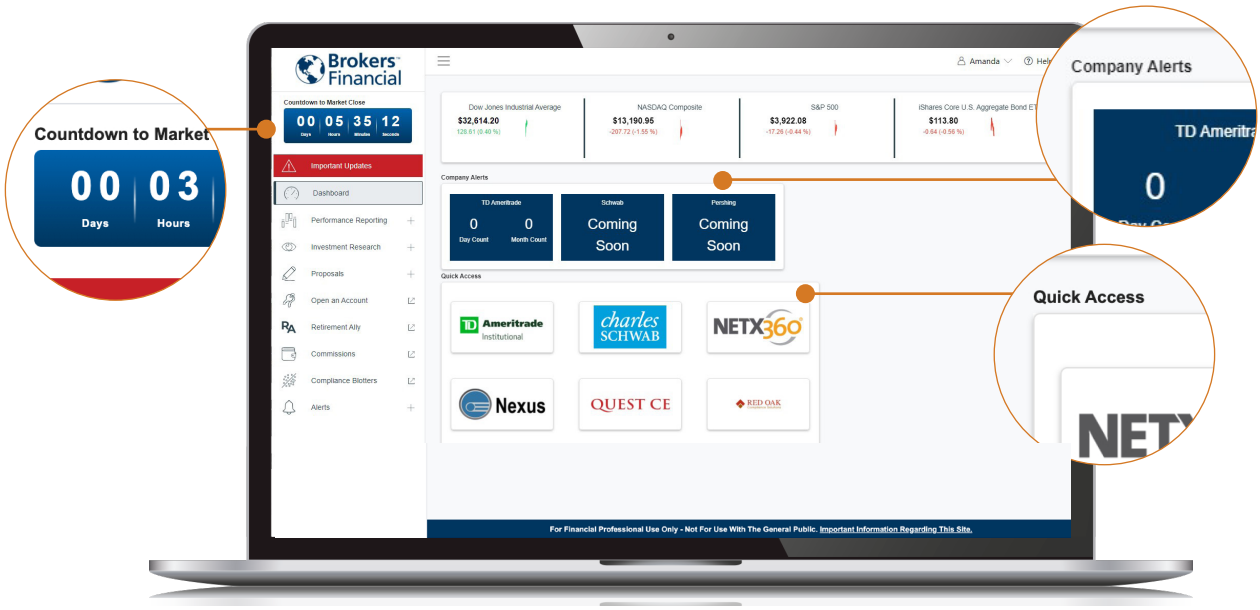
The second email just contains a link to your personalized Business Builder website. Use this link to access the site anytime, or simply visit **https://brokersfinancial.business-builder.app** directly. When prompted to log in, enter your newly created username and password and you're in. It's as simple as that. You may want to bookmark this page for easy access.

DASHBOARD

The first page that appears when you log in is your dashboard. This is an overall snapshot of the day's market performance and your own business metrics, and it's a useful way to quickly get all the information you need to start your day.

At the top left, you'll see the Countdown Clock, that marks the time until market open or market close. The stock ticker along the top of the page shows how important indices are performing right now, and the Company Alerts bar shows a personalized snapshot of your own business activity.

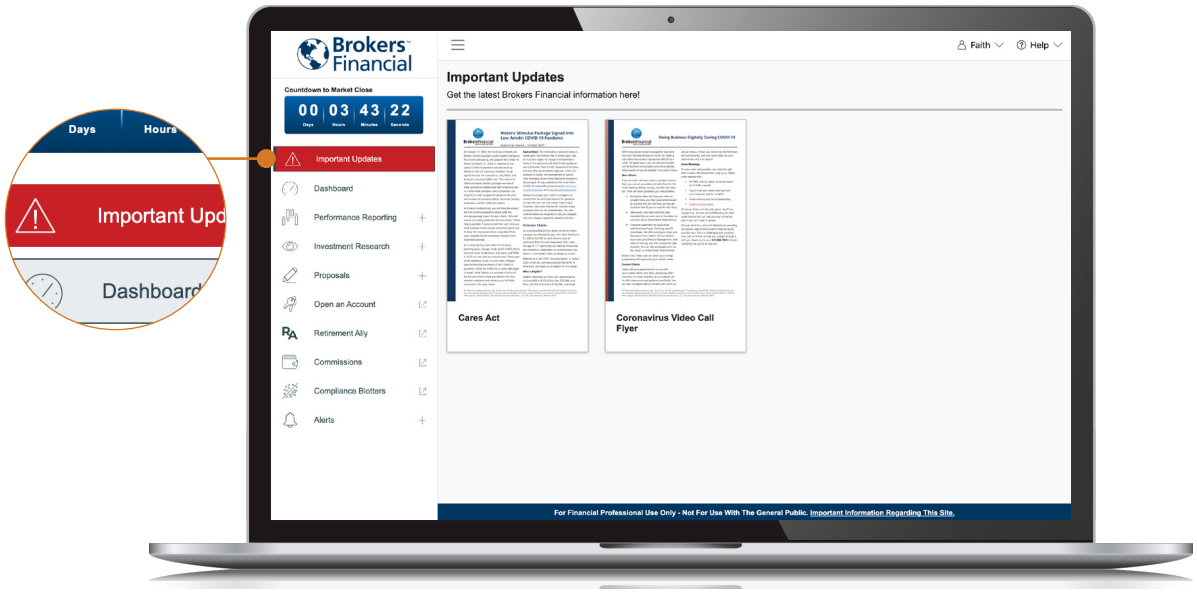
Quick Access includes a selection of our most-used links to make your day-to-day business activity, like checking client accounts, updating client files and finding up-to-date forms, as seamless as possible.



NAVIGATION PANEL

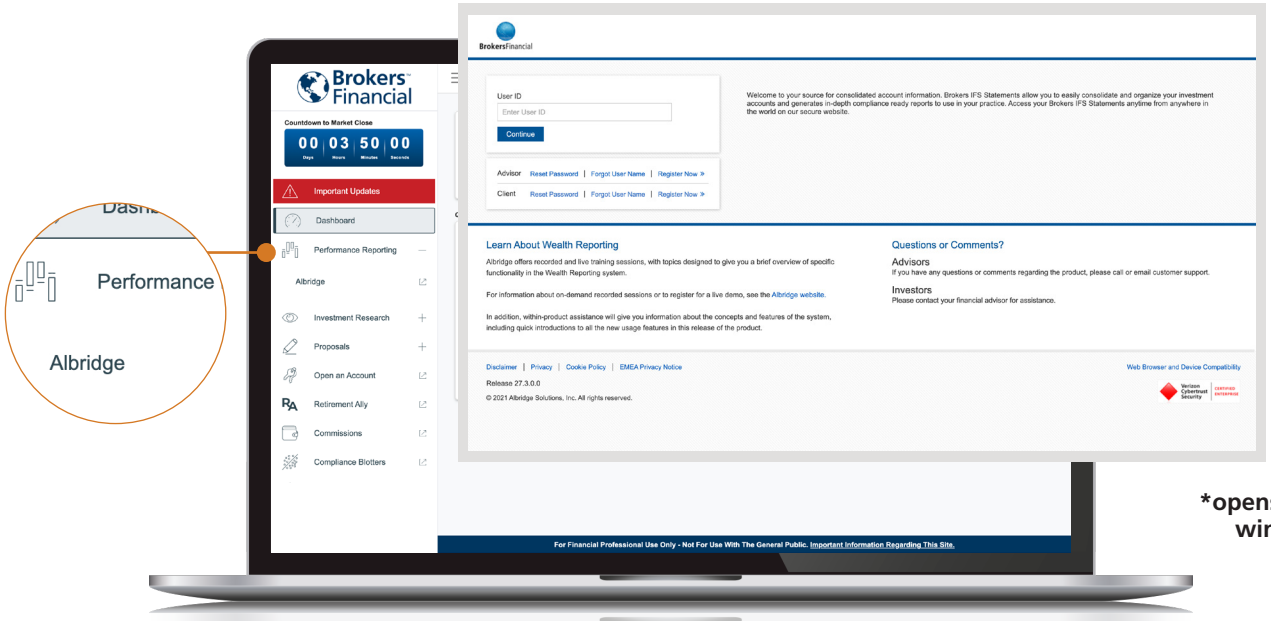
The navigation panel along the left side of the page provides at-your-fingertips access to important services and information. Here's a quick overview of each:

Important Updates – Find relevant updates and alerts for advisors, including information on legislative changes, tips for doing business in a changing world, and news analysis.



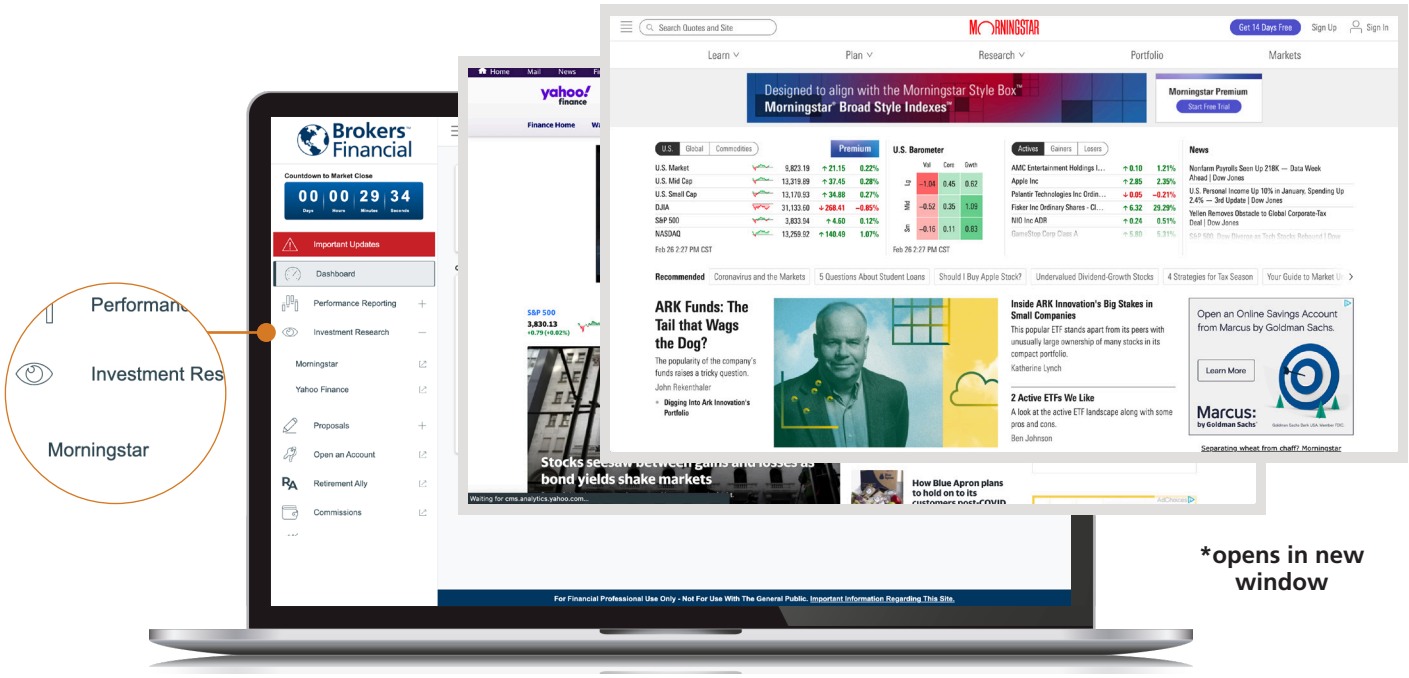
Dashboard – Click this link to return to your personalized dashboard.

Performance Reporting – Get one-click access to Albridge to create and present a holistic overview of clients' portfolios.



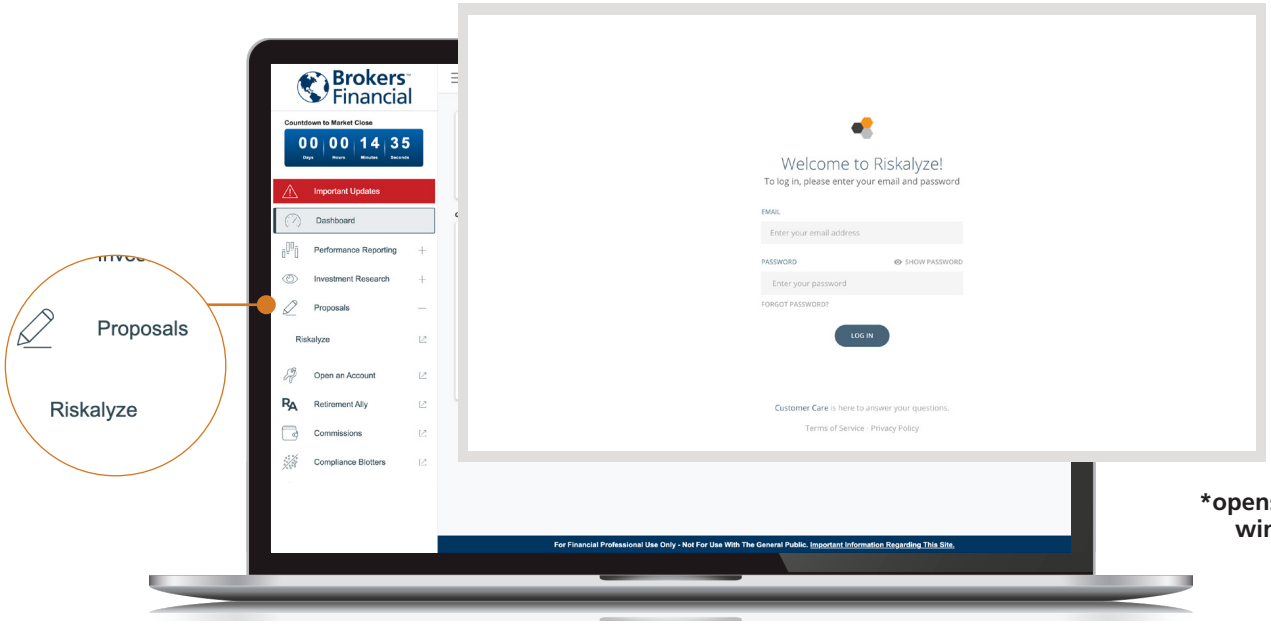
*opens in new window

Investment Research – Gets you to Morningstar and Yahoo Finance for the insight you need to make informed recommendations and decisions.



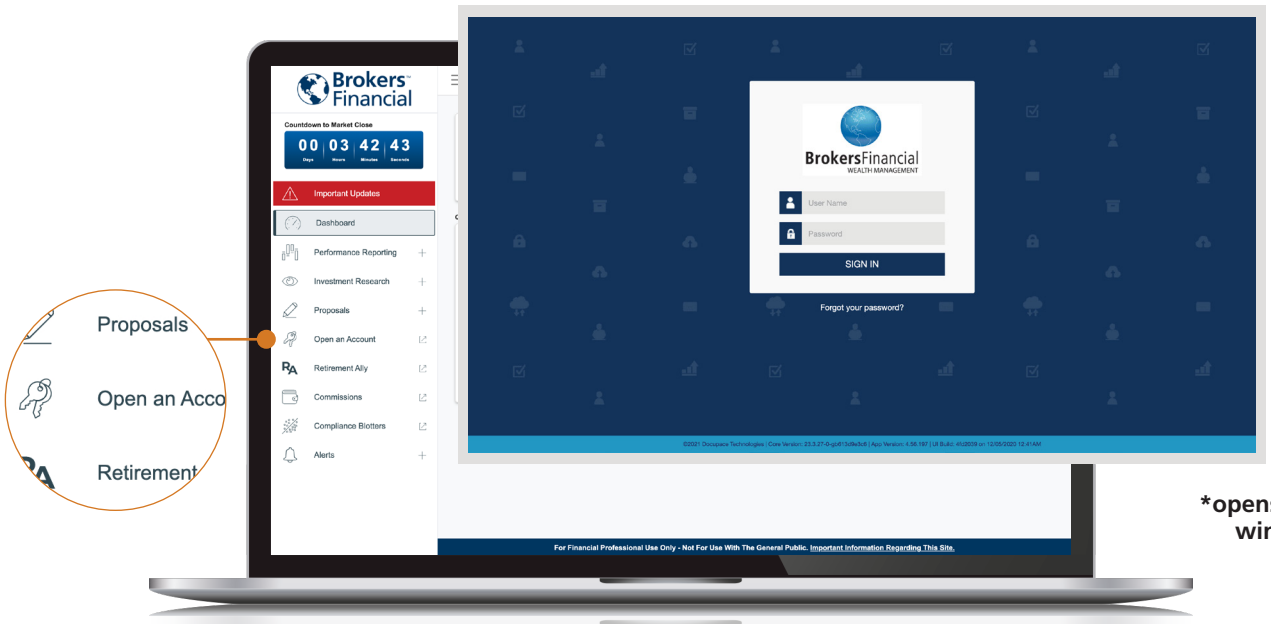
*opens in new window

Proposals – Opens Riskalyzer to help you create clear, insightful client proposals.



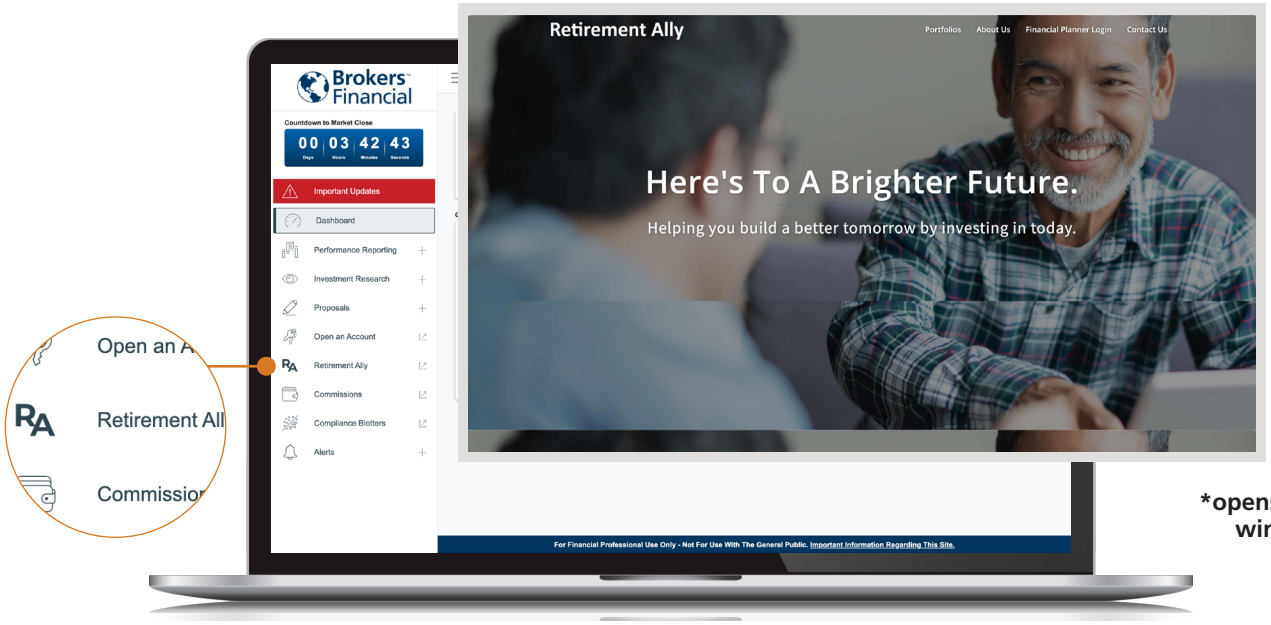
***opens in new window**

Open an Account – Onboard new clients and get the forms and documentation you need to help them establish new accounts with TD Ameritrade, Pershing or Charles Schwab.



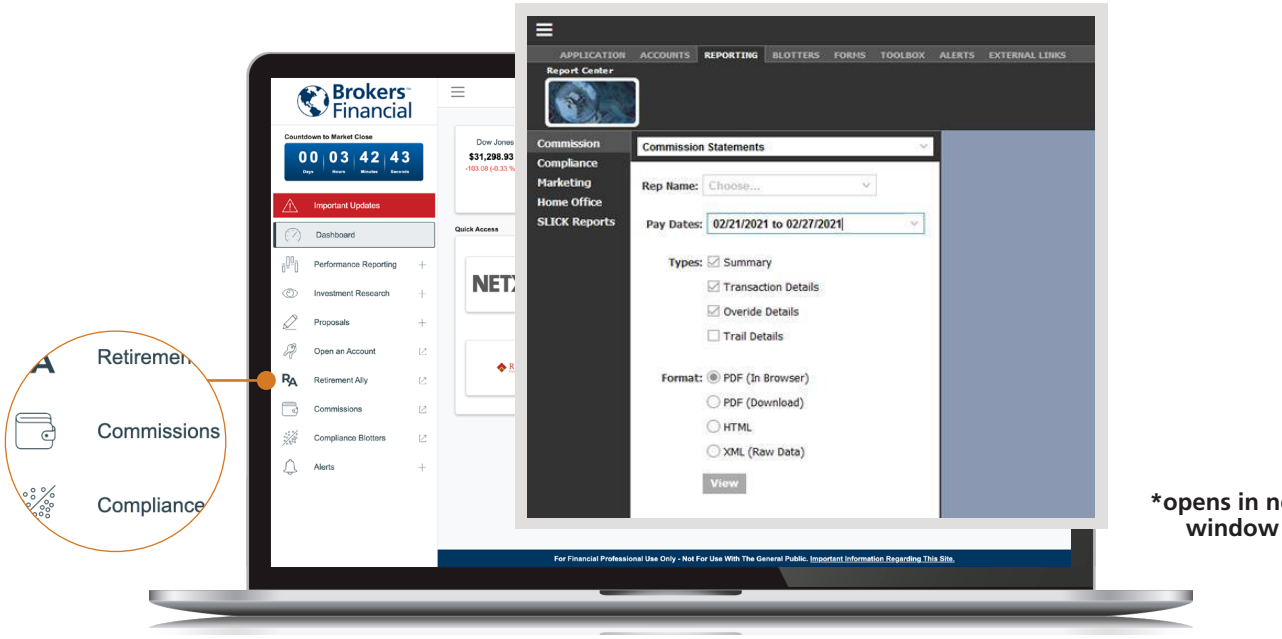
***opens in new window**

Retirement Ally – Take advantage of our proprietary funds, thoughtfully built and expertly managed to meet clients' needs.



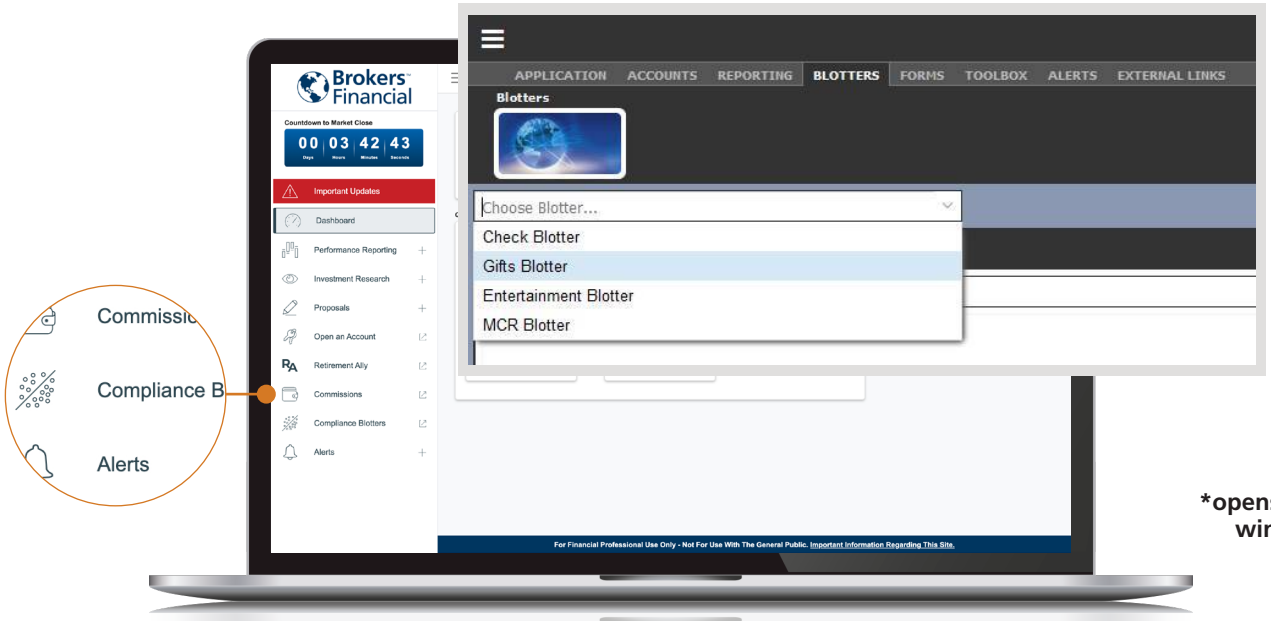
*opens in new window

Commissions – When will you be paid, and how much? The answers are here.



*opens in new window

Compliance Blotters – This is the place to find general compliance alerts, plus personalized notifications and reports. In addition, you can access Quest CE for required annual training.



***opens in new window**

Alerts – This is a more in-depth look into your personalized custodial account alerts, including transfers, payments and new account information.

MORE TO COME

Business Builder is on the road to becoming your portal to all of the tools, services and information you need to run your business seamlessly. You can look forward to one-click access to custodial accounts at Pershing, TD Ameritrade and Schwab, plus custodial account alerts right on the dashboard. We're also working toward full integration with Docupace to submit new business and receive NIGO alerts, and integrated AdMaster for speedy marketing material reviews. Once fully realized, users will have access to 12 separate tools and services, a library of marketing and educational material, updated forms and consumer marketing document ready to download, compliance reports and notifications, and more.

We're already at work adding many of these features. As we continue to develop this platform, we want your feedback: What's working for you, what would you like to see moving forward, and how can we best serve you?

Feel free to email Andy Osby at **aosby@brokersfinancial.com** or call the Brokers Financial office at **877.886.1939** to tell us about your experience.

For questions about Business Builder, e-mail us at info@brokersfinancial.com or call the Brokers Financial office at 877.886.1939.

BrokersFinancial. | Business Builder®