

# How to Access Structured Products Information

1. Login to your **V2020 Advisor Portal** by entering your username and password
2. Then click **Structured Products**

The screenshot displays the Woodbury Financial V2020 Advisor Portal interface. At the top, the logo for Woodbury Financial is visible, along with the text "Member of Advisor Group". The navigation bar includes a search box, a dropdown menu for "WFS", and a dropdown menu for "ALL". The main navigation menu contains several categories: Client Management, Office Management, Products, Advisory Services, Document Library, Business Development, Training & Events, and Support. The "Products" category is selected, and the breadcrumb trail shows "Home > Products > Structured Products > Structured Products". The "Structured Products" link in the breadcrumb trail is circled in red. On the left sidebar, the "Structured Products" link is also circled in red. The main content area displays the title "Structured Products" and a description: "Structured products are market-linked securities which provide returns to clients based on derivative exposure to a number of different asset types, including: individual stocks, baskets of stocks, indices, commodities, currencies, and other less-frequently used asset types. They are a combination of a traditional bond investment and one or more derivatives that are structured into one securitized instrument. Structured products begin as traditional securities, such as conventional investment-grade bonds, but replace the usual payment features (e.g. periodic coupons and final principal) with non-traditional payoffs derived not from the issuer's own cash flow or interest rates, but from the performance of one or more underlying assets." Below this description, there is a section titled "Structured Products (Investments) Currently Offered" and a list of "Structured Product Types": Market Linked Certificate of Deposits (MLCDs), Principal Protected Notes (PPNs), and on-Principal Protected Notes (NPPN's). On the right side of the page, there are sections for "My Alerts" (ServiceNet(0), MyNotification(0), TR Prep - Rep(0), eQuit(0)) and "Contact Us" (Incapital's internal desk at AdvisorSupport@incapital.com or 888-849-5732, and Advisor Group Product team at agr@advisorgroup.com).

# How to Access Required Training in SIMON

**1** Click on **Learning Center**

**2** Click on **Get Certified**

**3** Click on the level to begin the course

- A **blue dot** means you've watched the video
- A **blue ribbon** means you've passed the course

**Level 1**  
An introduction to the world of Structured Investments

**Level 2**  
A deeper dive into the various types of Structured Investments to help you choose the right one for your client

The content in Levels 4, 5, 6 and 7 was prepared by the index sponsor identified in the video and provided to SIMON for use on this page; all other content on this page is prepared by and the responsibility of SIMON unless otherwise explicitly stated or identified.

# How to Add the SIMON & InspereX Microsite to Your Landing Page

1. Login to your **V2020 Advisor Portal** by entering your username and password
2. Then click **Structured Products**

WOODBURY FINANCIAL  
Member of Advisor Group

VISION2020  
Advisor Portal

WFS ALL BackOffice | Home | Log Out | Contact Us | Help | Feedback

Client Management | Office Management | Products | Advisory Services | Document Library | Business Development | Training & Events | Support

MY PROFILE | COMMISSION REPORT CENTER | RECOGNITION PROGRAM

**LAUNCH APPS** View All

- ERS
- Compliance Manuals
- Incapital Structured Invest
- SIMON Structured Prod Trading**
- Salesforce
- Advisor Business Intelligence
- Morningstar
- OneView

**SAVED ITEMS**

- Newsbrief: Reminder on Levera...
- Advisor Group Playbooks
- Variable Annuities Home
- Variable Annuity Subscribe Pu...
- Pershing Fundvest
- Mutual Fund Reference List Ho...
- Compliance Manuals
- View All

**EXTERNAL LINKS**

- FINRA
- MSRB
- Manage External Links

**RECOGNITION PROGRAM**  
LEADING INDIVIDUALS  
As of March 31, 2020  
Kevin Myeroff  
Patricia Brennan

**NEWS ALERT**  
Coronavirus Response Resource Center  
In response to the expanding global spread of Coronavirus and its correlation to market activity, we've created this temporary hub to provide information for your business.  
Resources to help manage your client relationships: guidance and resources from our

**My Alerts**

- ServiceNet(0)
- MyNotification(0)
- TR Prep - Rep(0)
- eQuit(0)

**Manage Apps**

Application	Display
SIMON Structured Prod Trading	<input checked="" type="checkbox"/>
Incapital Structured Invest	<input checked="" type="checkbox"/>
ERS	<input checked="" type="checkbox"/>
Compliance Manuals	<input checked="" type="checkbox"/>
Salesforce	<input checked="" type="checkbox"/>
Advisor Business Intelligence	<input checked="" type="checkbox"/>
Morningstar	<input checked="" type="checkbox"/>
OneView	<input checked="" type="checkbox"/>
Client Central	<input type="checkbox"/>
Quick Submit	<input type="checkbox"/>
NetX360.com	<input type="checkbox"/>

Move Up Move Down

Checked applications will display on the Dashboard. To change the order of Launch Apps, highlight application and select Move Up or Move Down

Close

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