

How to Access Structured Products Information

1. Login to your **V2020 Advisor Portal** by entering your username and password
2. Under **Products**, click **Fixed Income**
3. Then click **Structured Products**

The screenshot displays the V2020 Advisor Portal interface. At the top left is the Royal Alliance logo, and at the top right is the VISION2020 ADVISOR PORTAL header with a search bar. Below the header is a navigation menu with options: Client Management, Office Management, **Products** (circled in red), Advisory Services, Document Library, Business Development, Training & Events, and Support. The main content area is titled "Products" and shows a breadcrumb trail: Home > Products > Fixed Income > **Structured Products** (circled in red). A sidebar on the left lists various product categories, with "Fixed Income" circled in red. The main content area for "Structured Products" includes a description of structured products, a list of currently offered products (MLCDs, Principal Protected Notes, Non-Principal Protected Notes), and a "My Alerts" section with links to ServiceNet, MyNotification, TR Prep - Rep, and eQuit. A "Contact Us" section provides contact information for Incapital's internal desk.

How to Access Required Training in SIMON

The screenshot shows the SIMON Learning Center interface. The top navigation bar includes 'Dashboard', 'Learning Center', 'Marketplace', and 'Lifecycle Portal'. A search bar is present with the text 'Find an investment'. Below the navigation bar, there are three main sections: 'Learning Center' (highlighted with a red box and a blue circle with the number 1), 'Marketplace', and 'Lifecycle Portal'. The 'Learning Center' section contains the text 'Extensive online library with course content from introductory basics to product-specific training.' To the right, there is a 'Get Certified' button (highlighted with a red box and a blue circle with the number 2) and an 'Explore' button. Below the 'Get Certified' button, there is a list of training levels: 'Level 1', 'Level 2', and 'Level 3'. The 'Level 1' item is highlighted with a red box and a blue circle with the number 3. The 'Level 1' item shows a progress bar with a blue dot and a blue ribbon. Below the 'Level 1' item, there is a detailed view of the 'Level 1' course, including a video player and a quiz section.

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 the page; all other content on this page is prepared by and the responsibility of SIMON unless otherwise explicitly stated or identified.

How to Add SIMON & Incapital's Microsite to Your Landing Page

1. Under **Launch Apps**, click **View All**
2. Check **SIMON Structured Prod Trading** and **Incapital Structured Invest** , then click **Close**

Royal Alliance
Member of Advisor Group

VISION2020
ADVISOR PORTAL

RAA 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)
- eQuipt(0)

Manage Launch 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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