

How to Access InspereX Microsite & SIMON

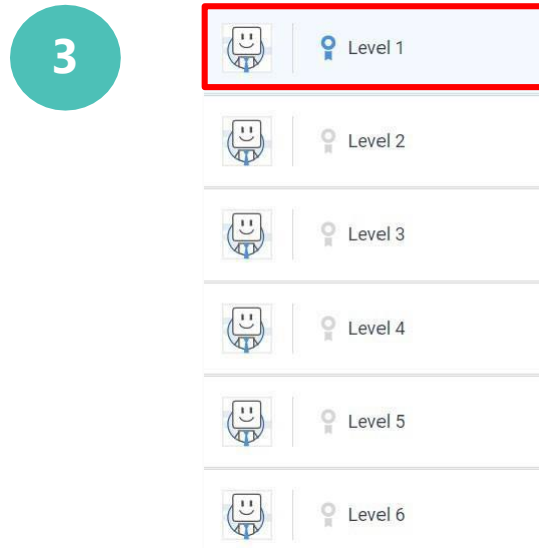
1. Login to your **V2020 Advisor Portal** by entering your username and password
2. On the **Home Page**
3. Under **Launch Apps**
4. Click **View All**

The screenshot shows the VISION2020 Advisor Portal home page. The top navigation bar includes the 'osaic' logo, 'VISION2020 ADVISOR PORTAL', a search bar, and links for 'Home | Log Out | Contact Us | Help'. Below the navigation bar is a menu with categories: Client Management, Office Management, Products, Advisory Services, Document Library, Business Development, Training & Events, and Support. The main content area features a 'Show/Hide NewsFlash' button and a 'MY PROFILE | COMMISSION REPORT CENTER' link. The 'LAUNCH APPS' section is highlighted with a red circle, and 'InspereX Structured Products' is circled in red. The 'SAVED ITEMS' section shows 'No Items to Display'. The 'EXTERNAL LINKS' section includes 'FINRA', 'MSRB', and 'Manage External Links'. A 'RECOGNITION PROGRAM' banner is visible at the bottom left, and a 'My Alerts' section is at the bottom right.

The screenshot shows the 'Manage Launch Apps' dialog box. It contains a table with two columns: 'Application' and 'Display'. The 'Display' column has checkboxes. 'InspereX Structured Products' and 'SIMON' are checked and highlighted with a red box. Below the table are 'Move Up' and 'Move Down' buttons. At the bottom, a 'Close' button is circled in red. A note at the bottom states: 'Checked applications will display on the Dashboard. To change the order of Launch Apps, highlight application and select Move Up or Move Down.'

Application	Display
InspereX Structured Products	<input checked="" type="checkbox"/>
SIMON	<input checked="" type="checkbox"/>
Client Central	<input checked="" type="checkbox"/>
OneView	<input checked="" type="checkbox"/>
Salesforce	<input checked="" type="checkbox"/>
NetX360.com	<input type="checkbox"/>
Wealthscape	<input type="checkbox"/>
Wealth Management Platform	<input type="checkbox"/>
Advisor Business Intelligence	<input type="checkbox"/>
My Goals	<input type="checkbox"/>
RegEd	<input type="checkbox"/>

How to Access Required Training in SIMON



1. Click on **Learning Center**
2. Click on **Training Courses**
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

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 V2020 Advisor Portal interface. At the top, the 'osaic' logo is on the left, and the 'VISION2020 ADVISOR PORTAL' logo is on the right, accompanied by a search bar and a 'SEARCH' button. Below the logo is a navigation menu with links for 'Home | Log Out | Contact Us | Help | Feedback'. A secondary navigation bar contains tabs for 'Client Management', 'Office Management', 'Products' (highlighted with a red arrow), 'Advisory Services', 'Document Library', 'Business Development', 'Training & Events', and 'Support'. The main content area is titled 'Products' and shows a breadcrumb trail: 'Home > Products > Structured Products > Structured Products', with the final 'Structured Products' link circled in red. A 'SAVE' button is visible next to the breadcrumb. On the left sidebar, a list of product categories includes 'Mutual Funds', 'ETFs/ETPs', 'Annuities', 'Fixed Income', 'Structured Products' (circled in red), 'Employer Sponsored Retirement Plans', 'Retirement Income Planning', 'Life Insurance', '529 Plans', 'Alternative Investments', 'Lending Solutions', 'High Net Worth Solutions', and 'Market Research'. The main content area features a heading 'Structured Products' and a paragraph explaining that structured products are market-linked securities providing returns based on derivative exposure to various asset types. Below this is a section titled 'Structured Products (Investments) Currently Offered' with a sub-heading 'Structured Product Types:' and a bulleted list: 'Market Linked Certificate of Deposits (MLCDs)', 'Principal Protected Notes (PPNs)', and 'Non-Principal Protected Notes (NPPN's)'. On the right side, there is a 'My Alerts' section with a list of alerts (e.g., 'ServiceNet(0)', 'MyNotification(323)') and a 'Contact Us' section providing contact information for the InspereX Internal Desk.

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