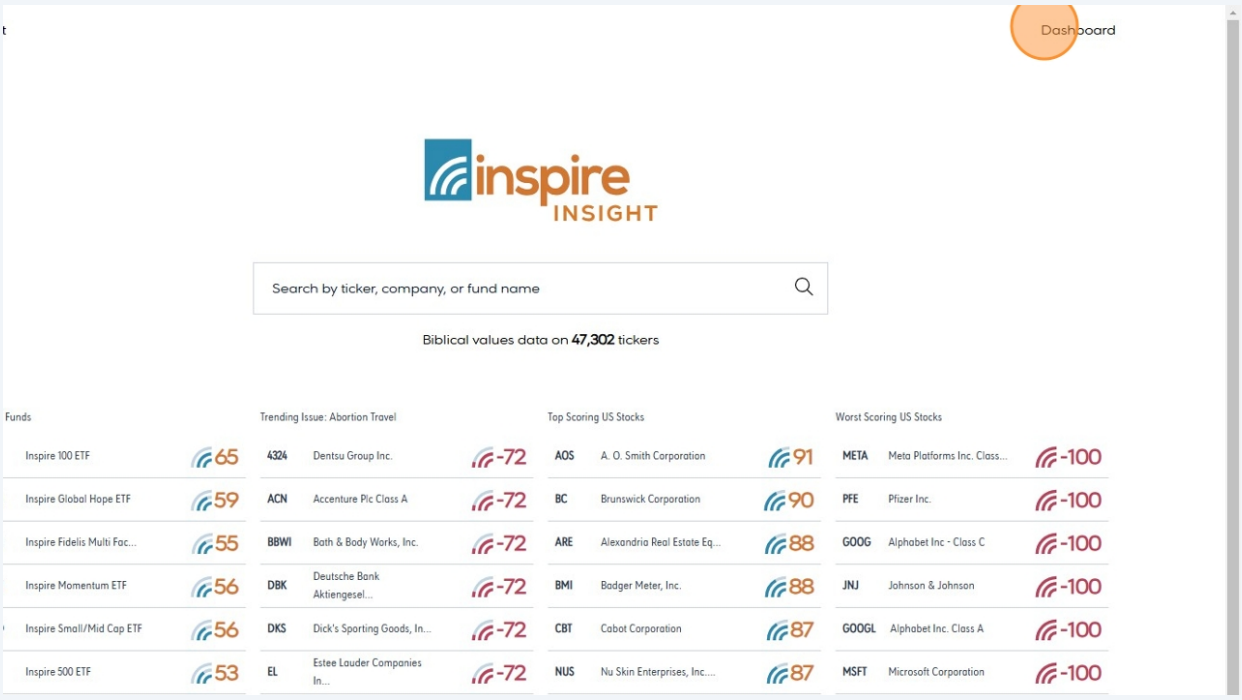
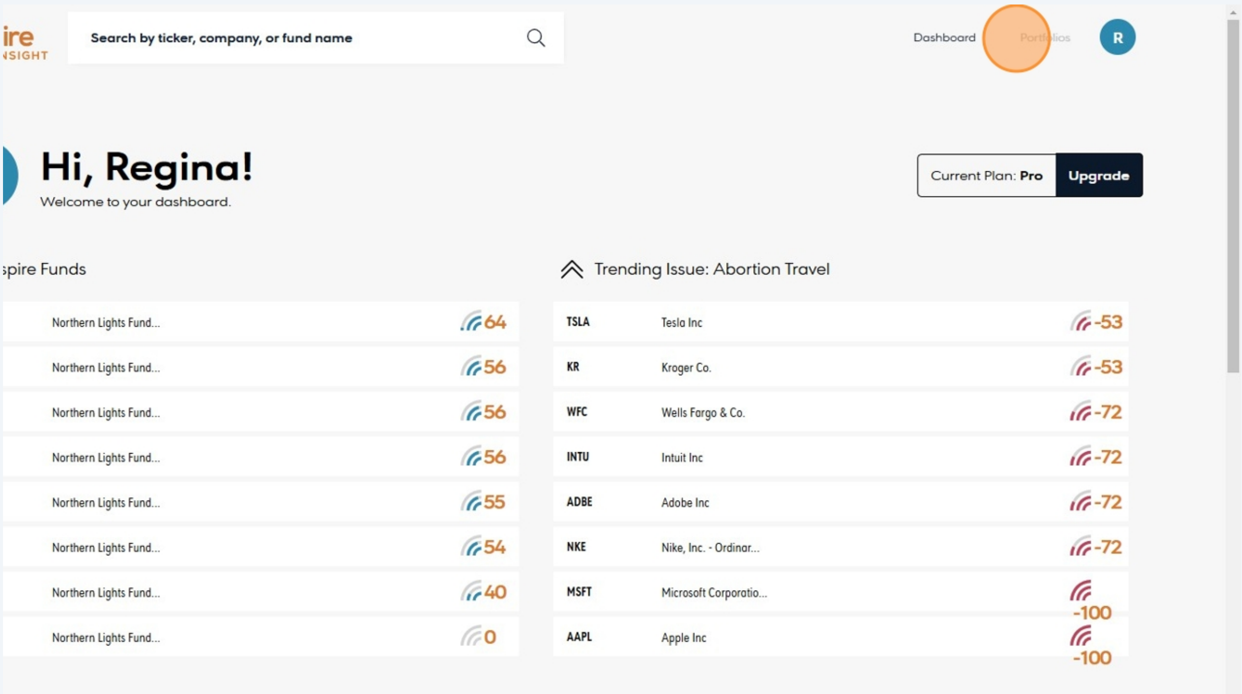
Create An Impact Report Demo Using Hidden Levers

1 Navigate to https://inspireinsight.com/

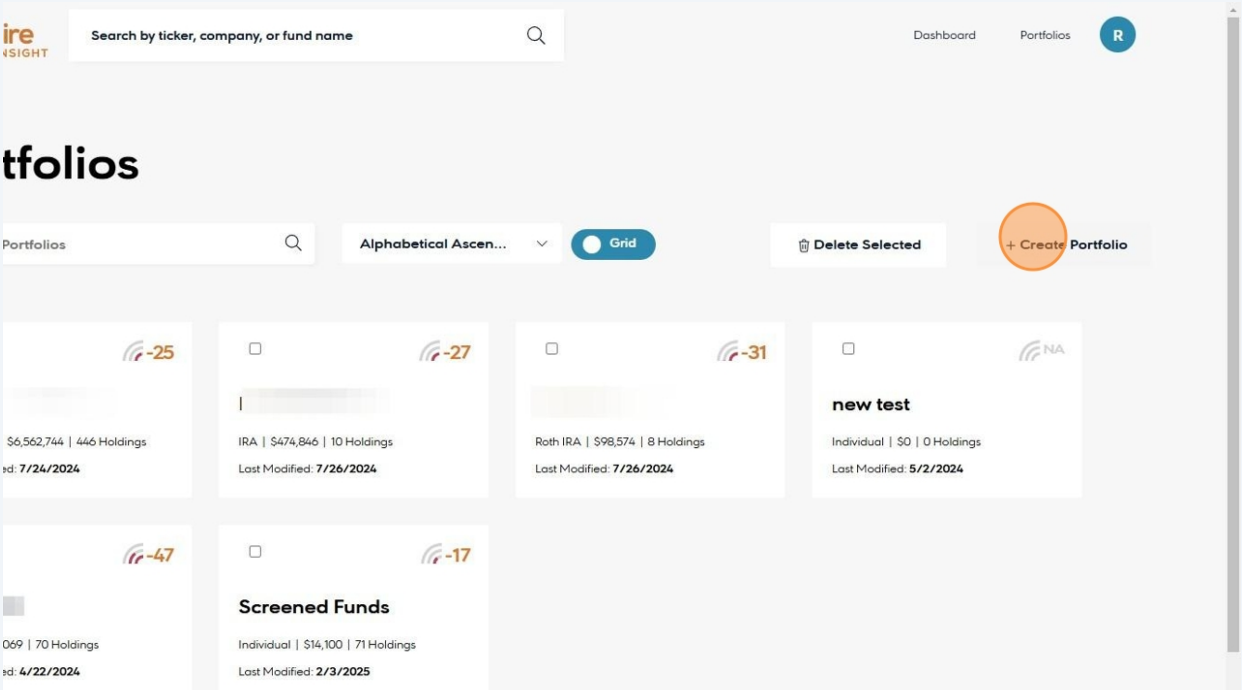
2 Click "Dashboard"



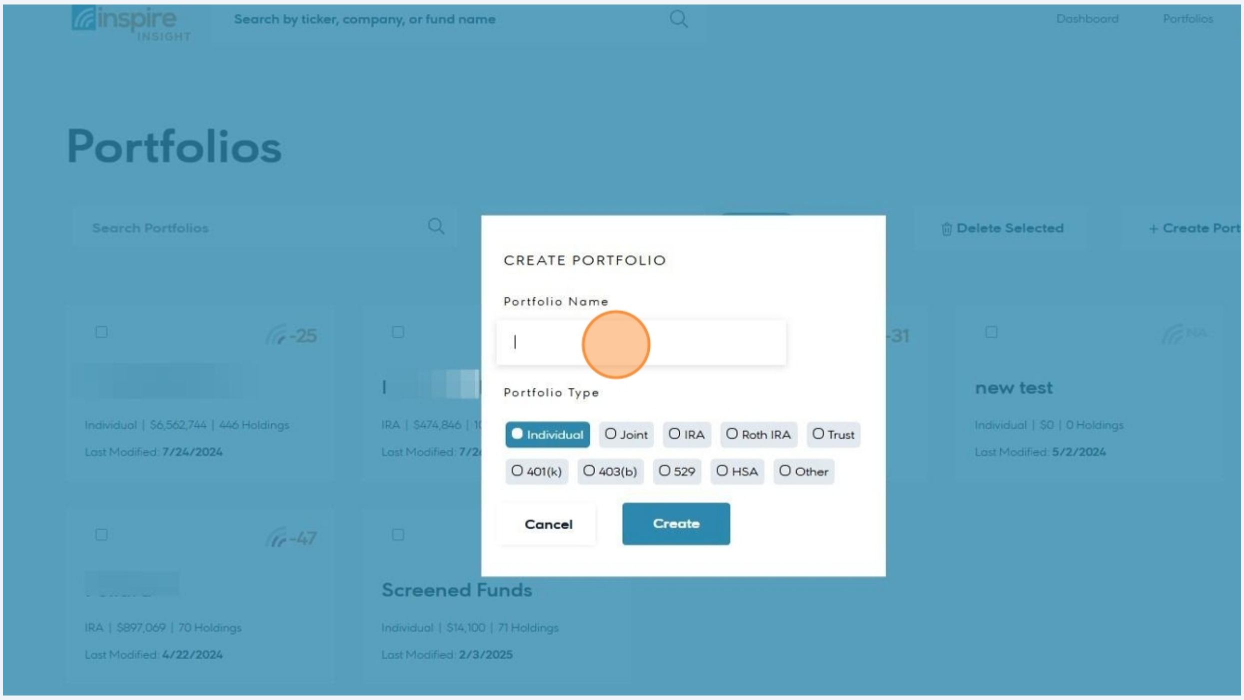
3 Click "Portfolios"



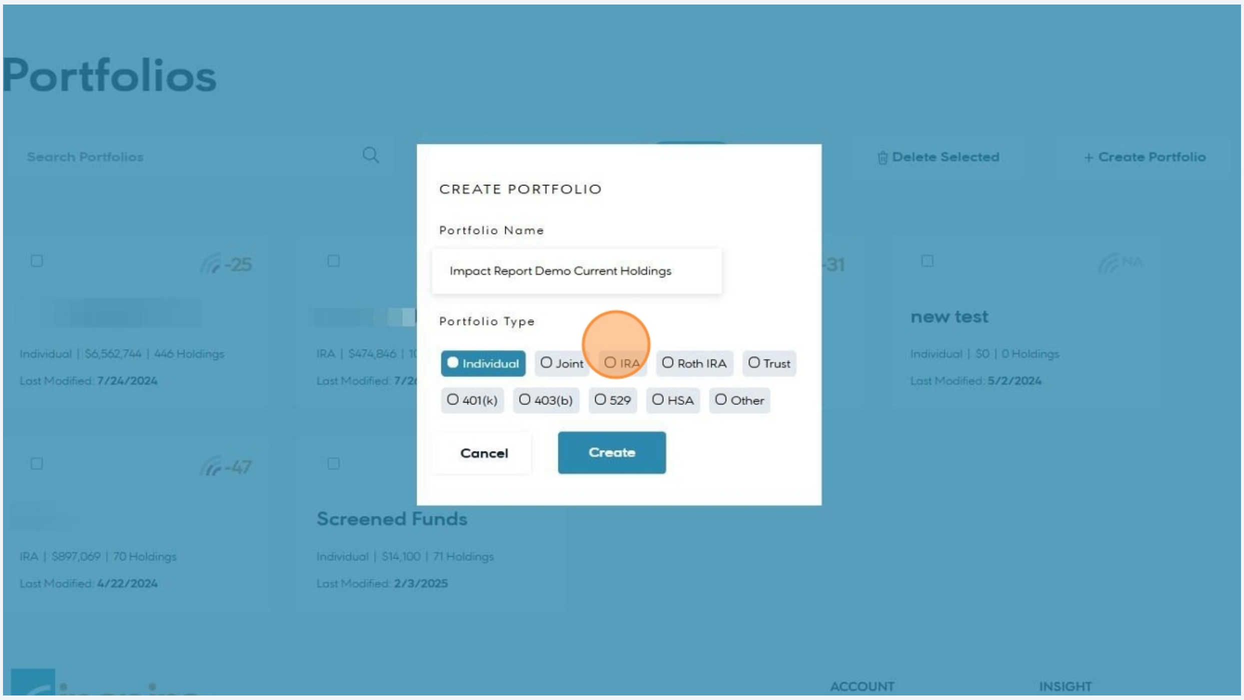
4 Choose Create Portfolio



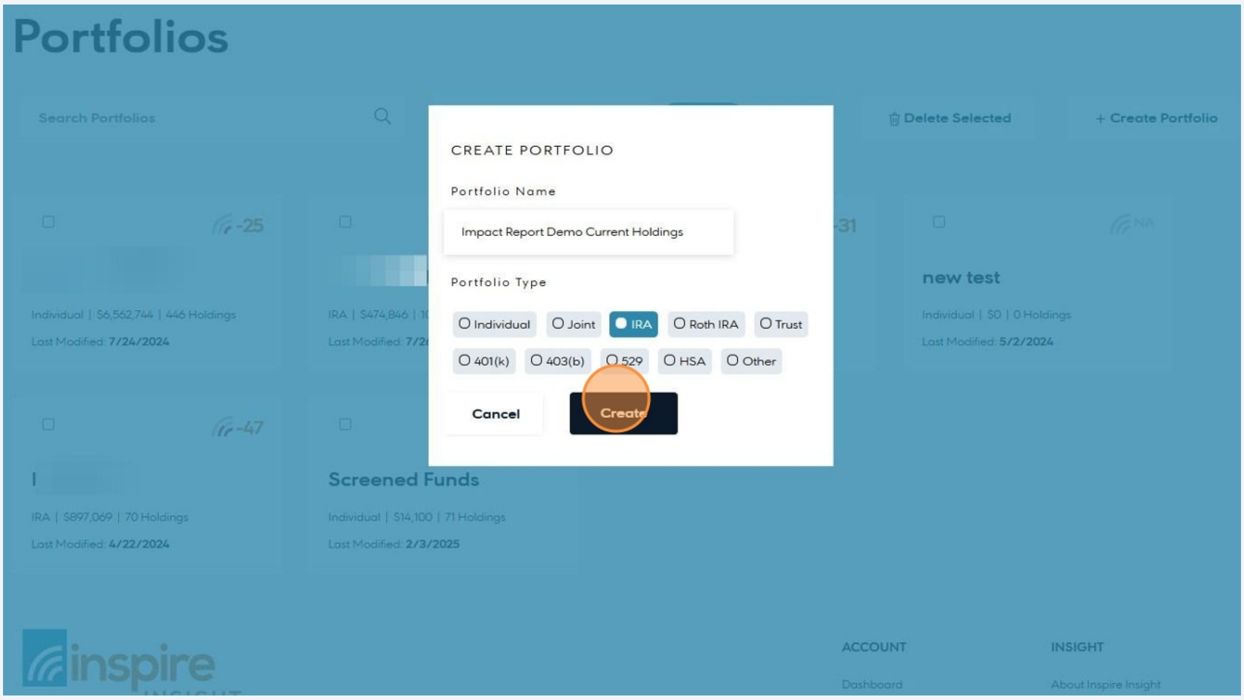
5 Enter the Client's Name



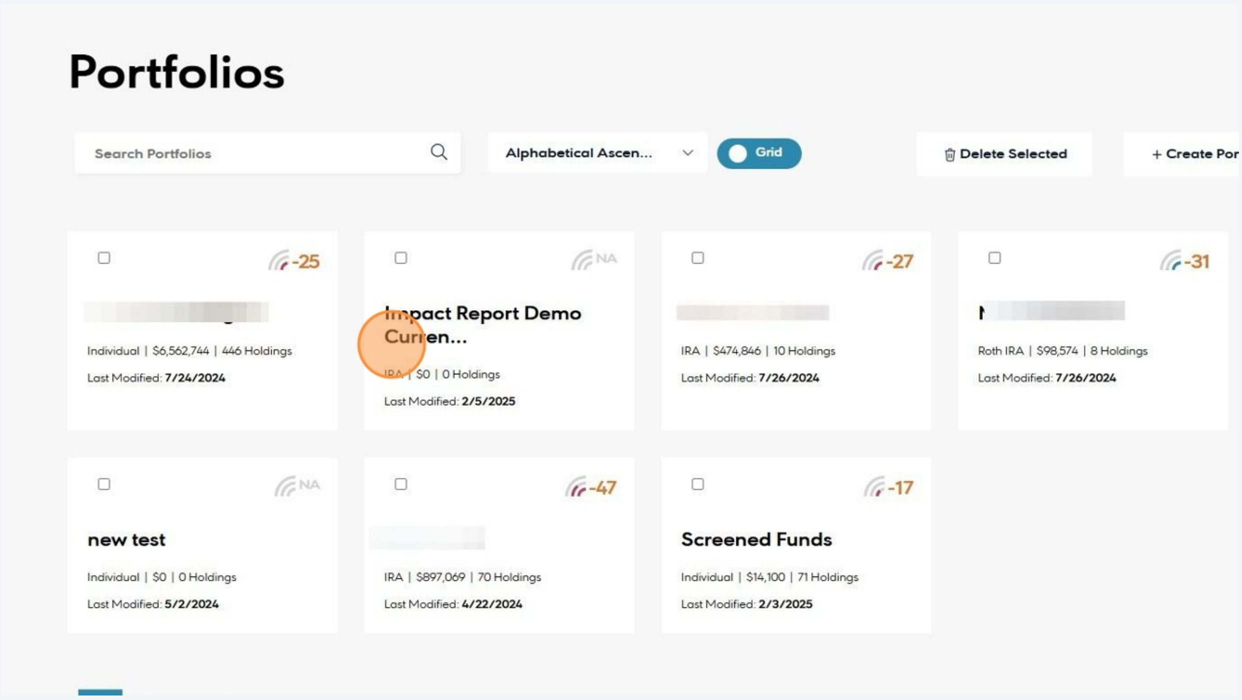
6 Choose the account type



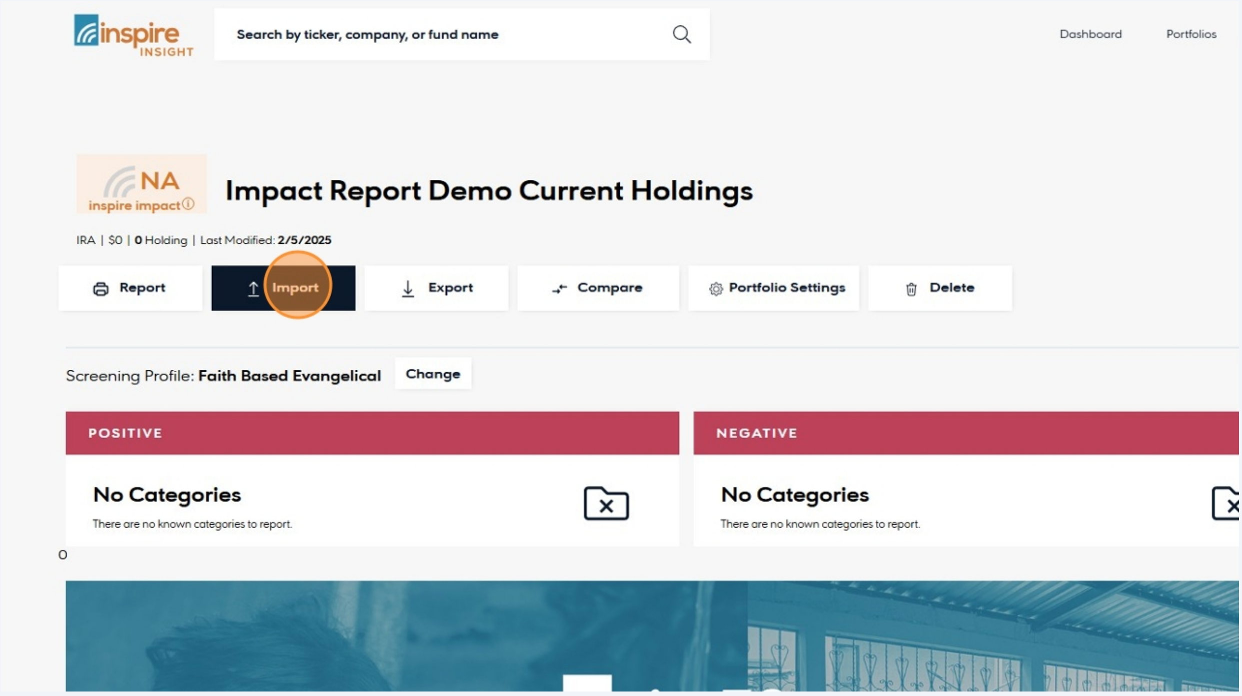
7 Click "Create"



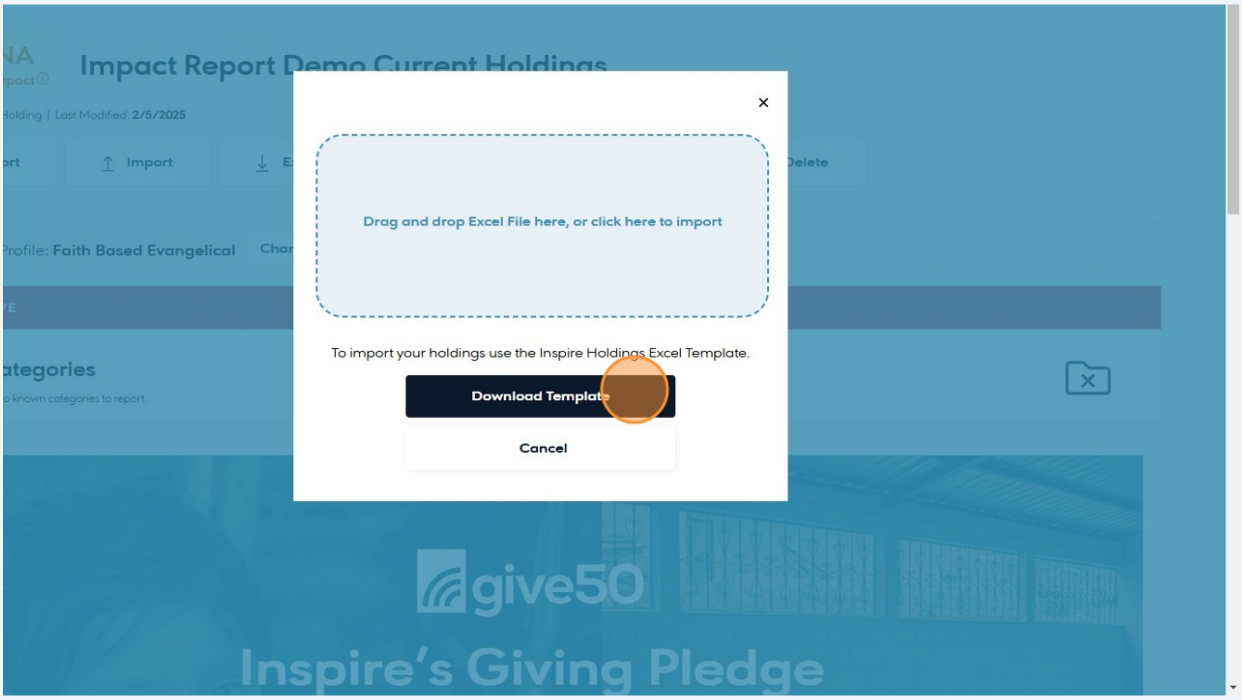
8 Click on the portfolio you just made



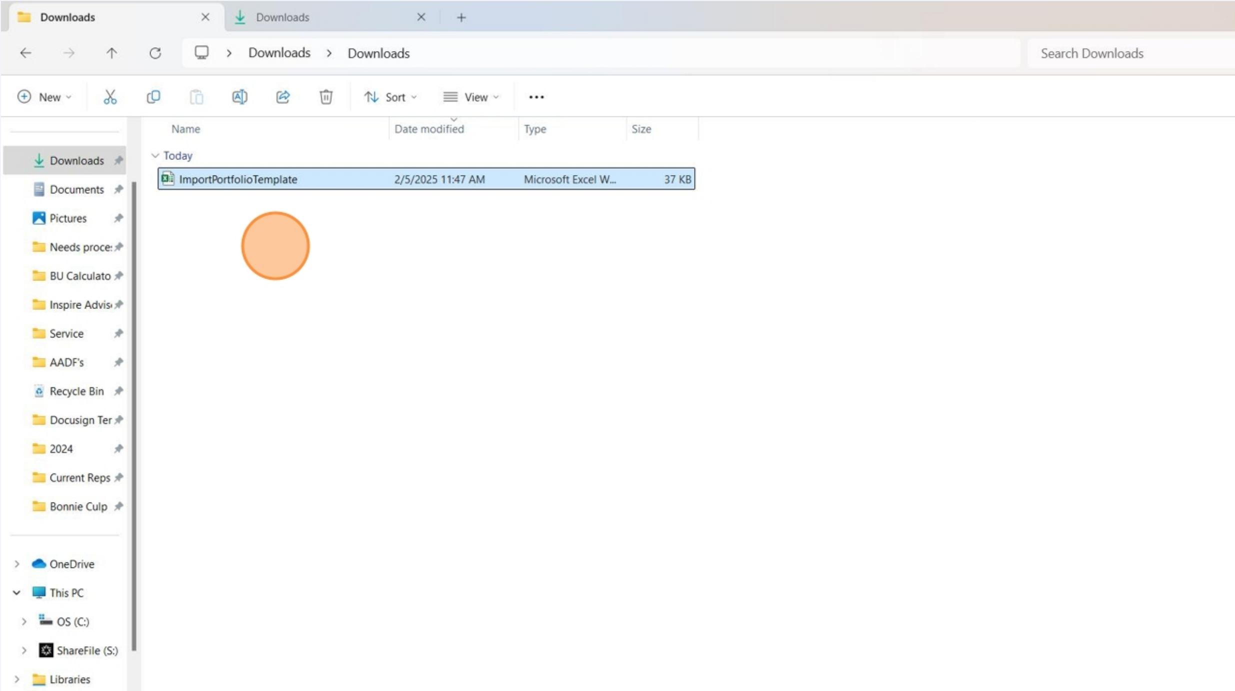
9 Click "Import"



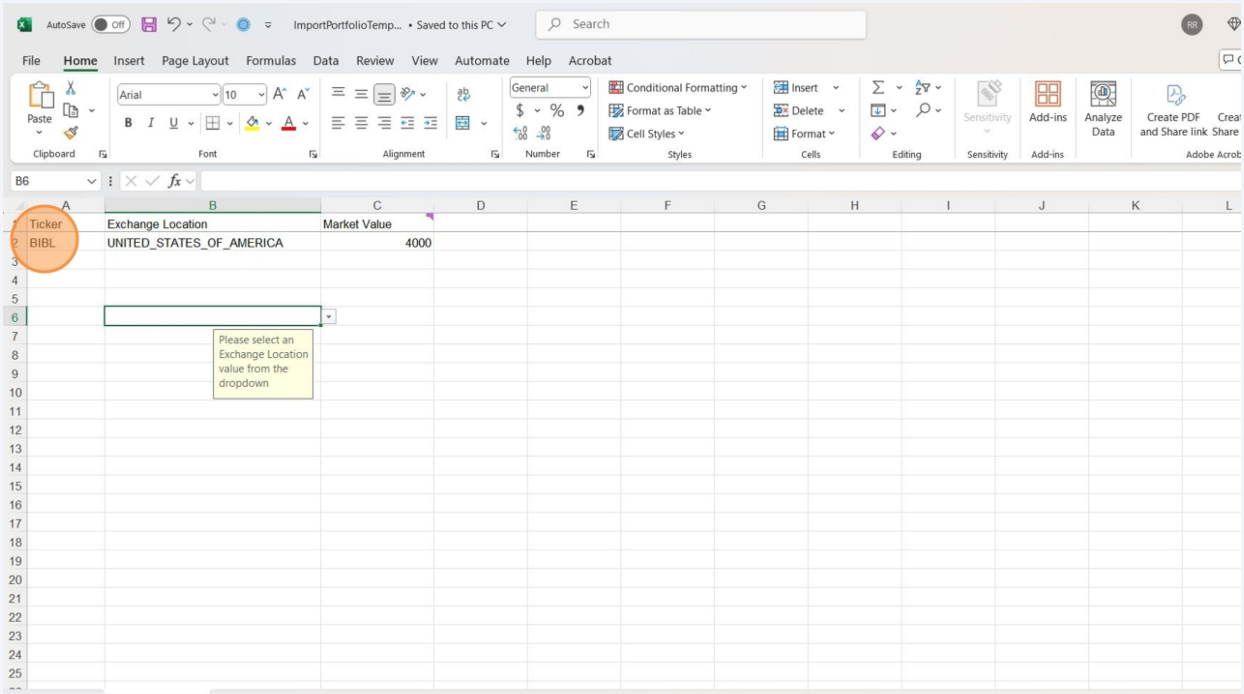
10 Download the template



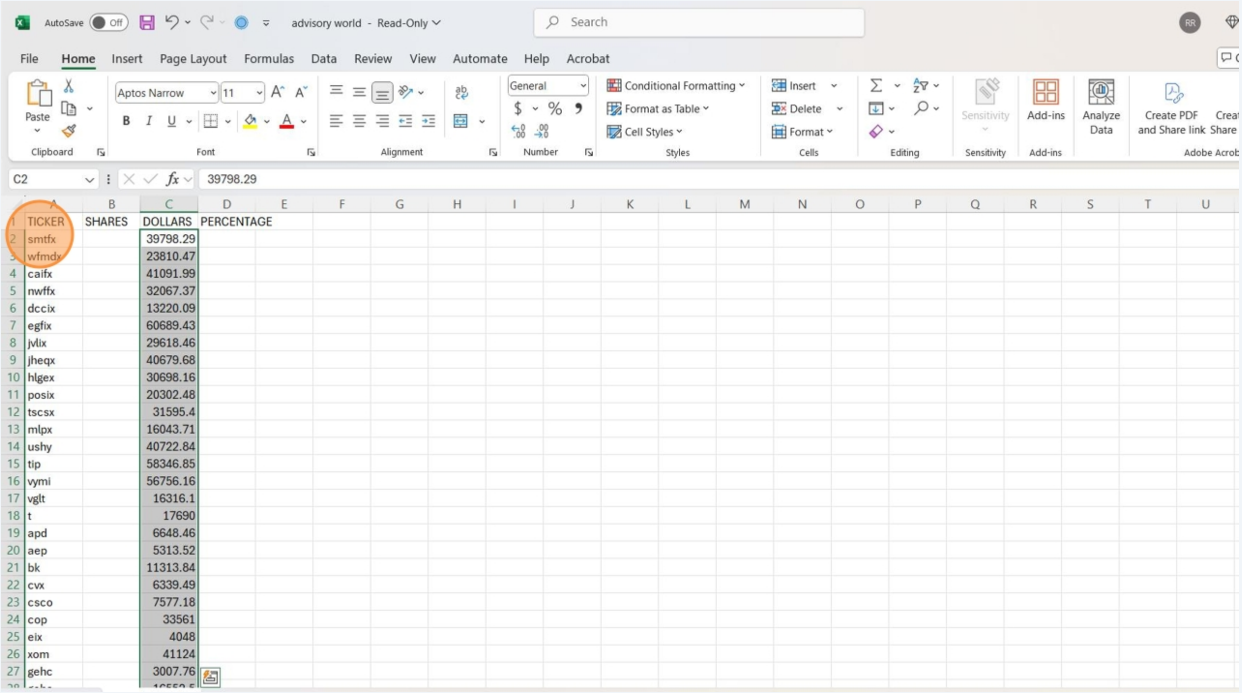
11 Open the template you just downloaded. It should be in your downloads folder



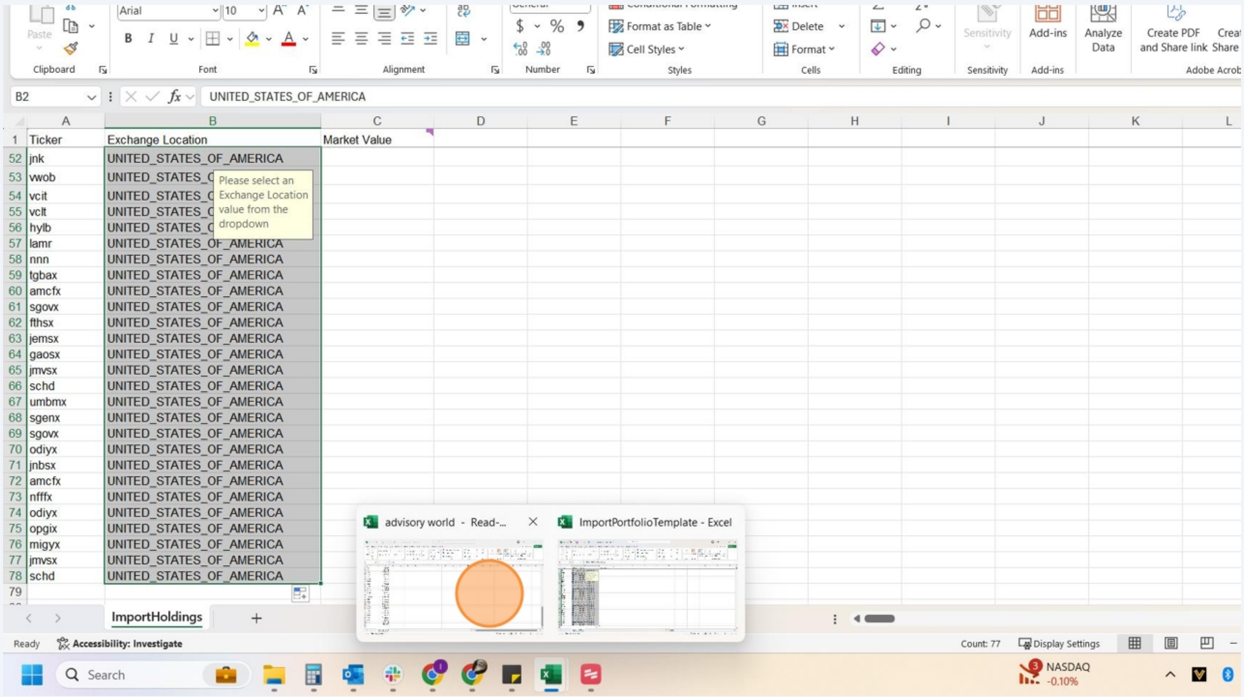
12 Click the yellow ribbon at the top to begin editing. Remove the example holdings.



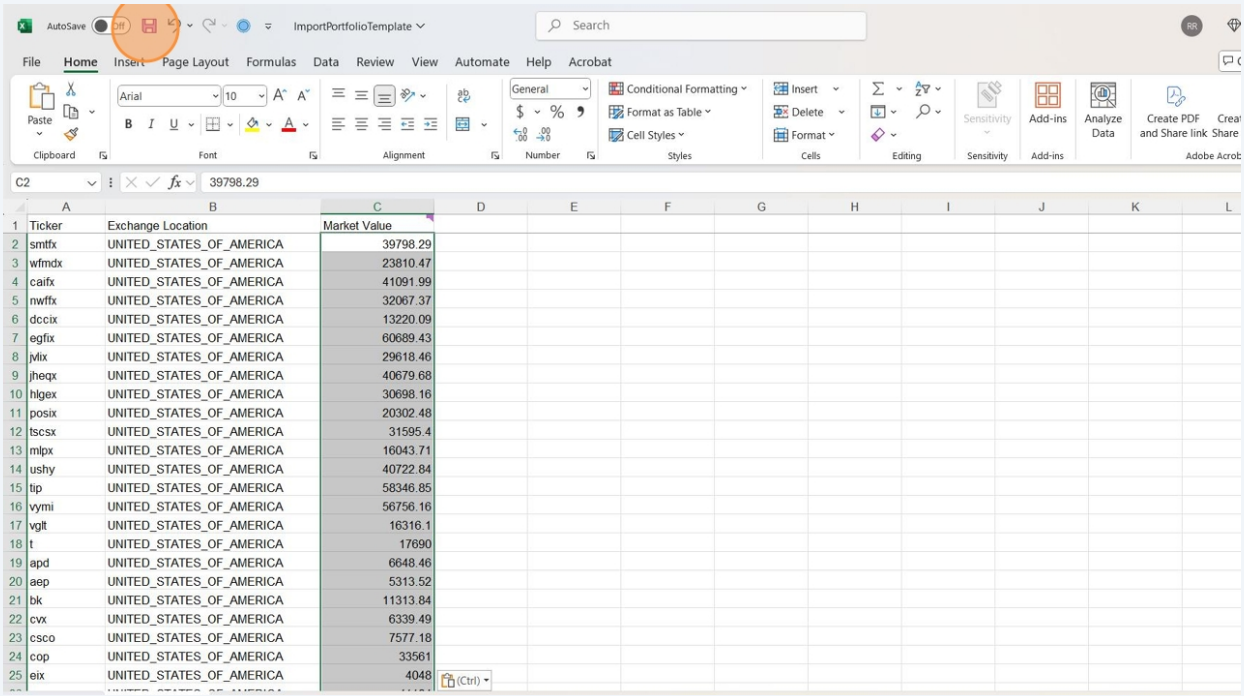
13 If you have a spreadsheet with the client's current holdings, navigate there. You can then copy the TICKER and Value into the template.



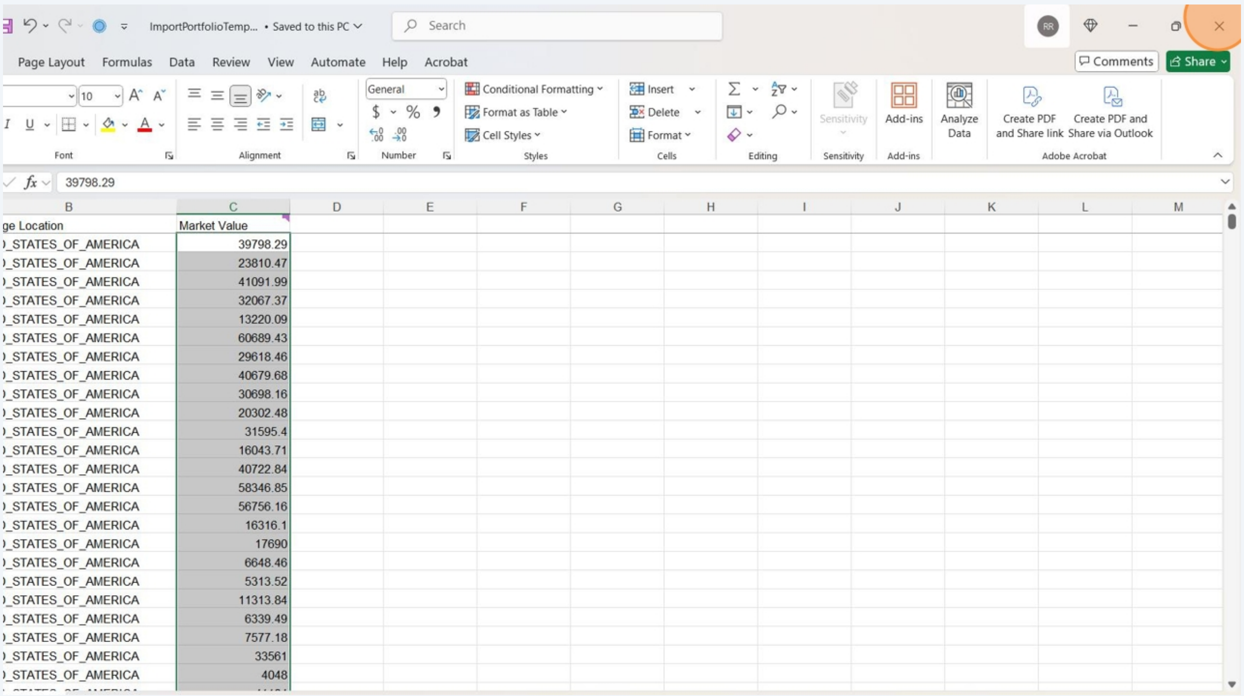
14 Make sure to choose the exchange location for all holdings



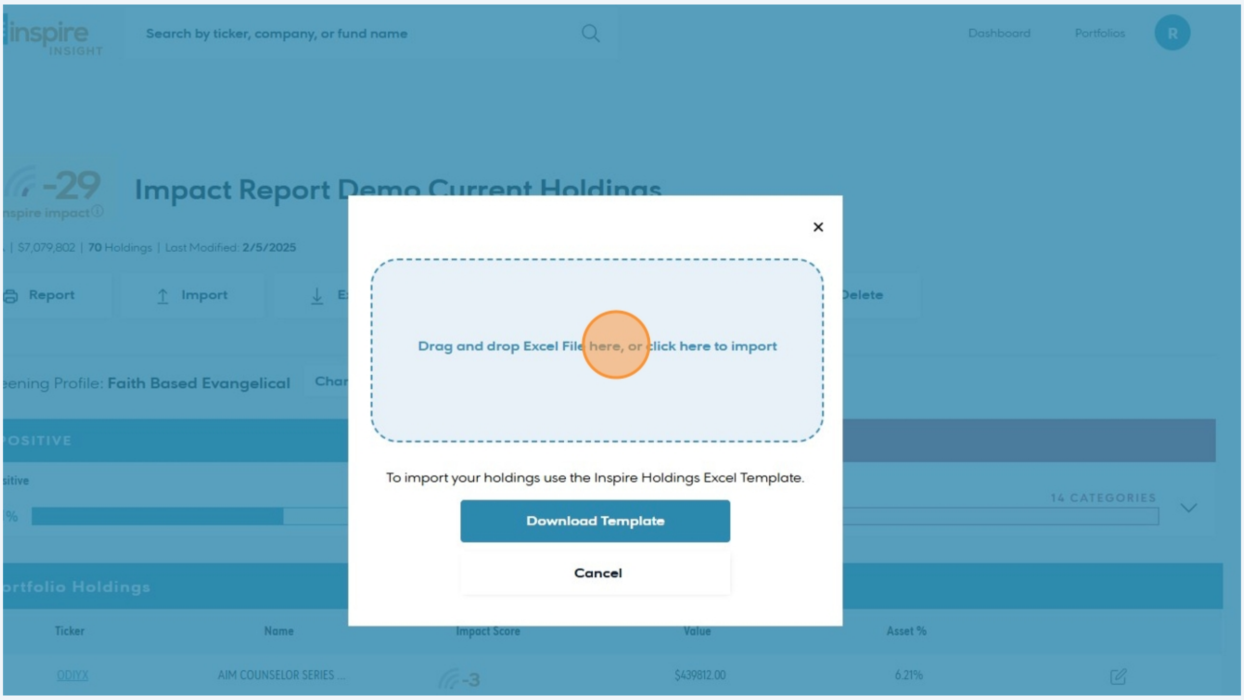
15 Click "Save"



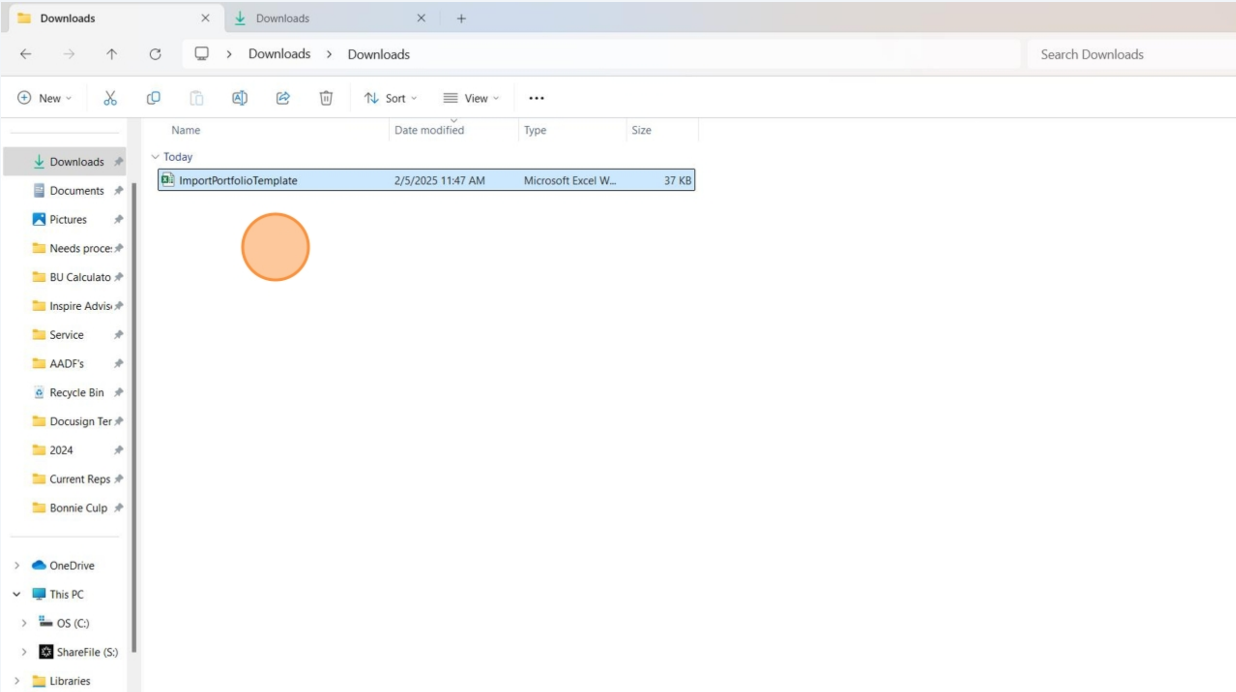
16 Click "Close"



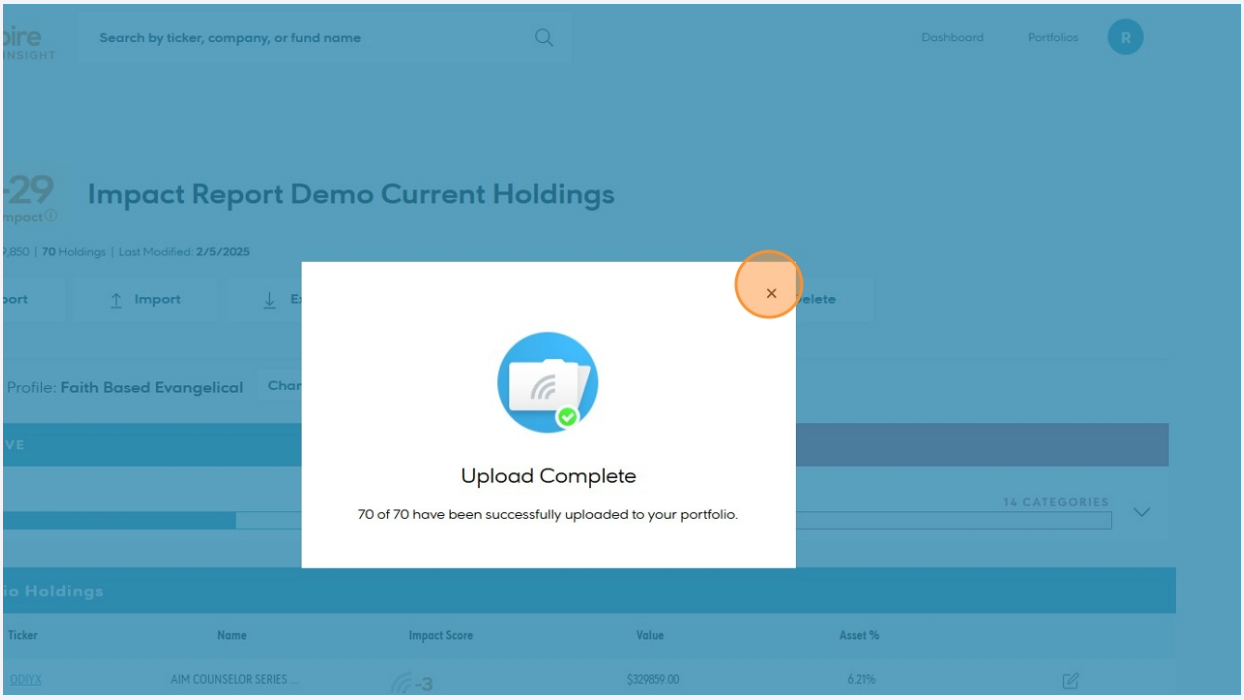
17 Navigate back to Inspire Insight in your browser

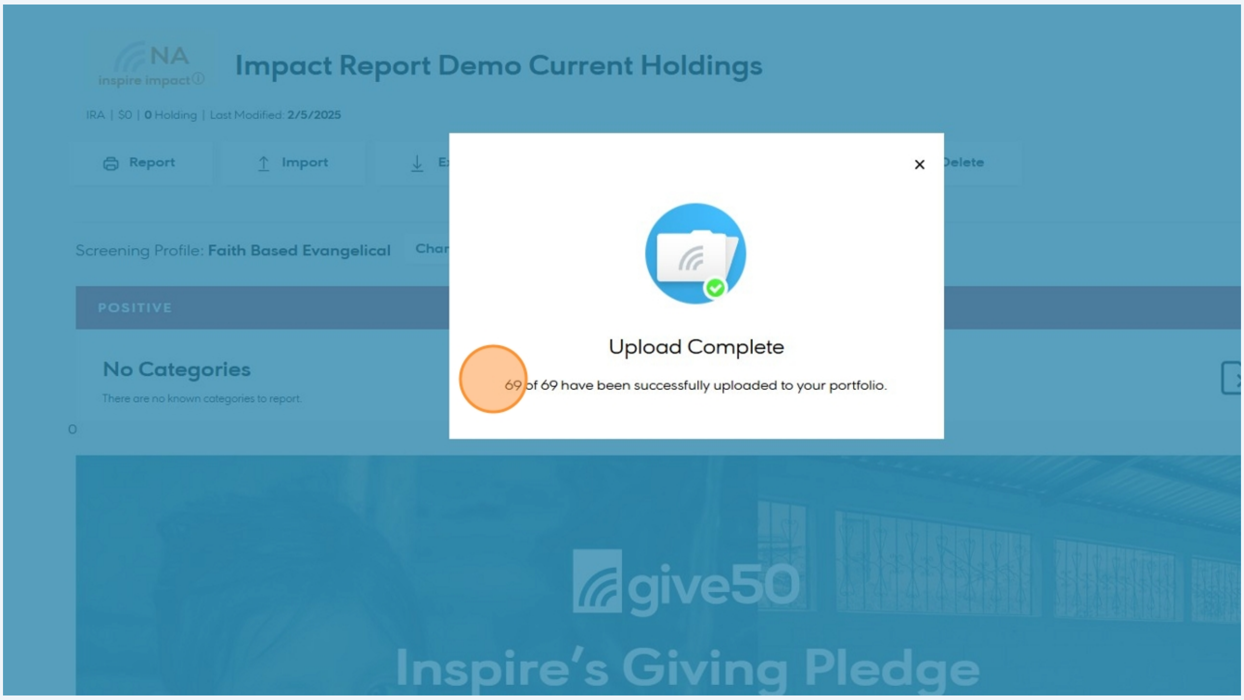


18 Drag the completed template into the open pop up.

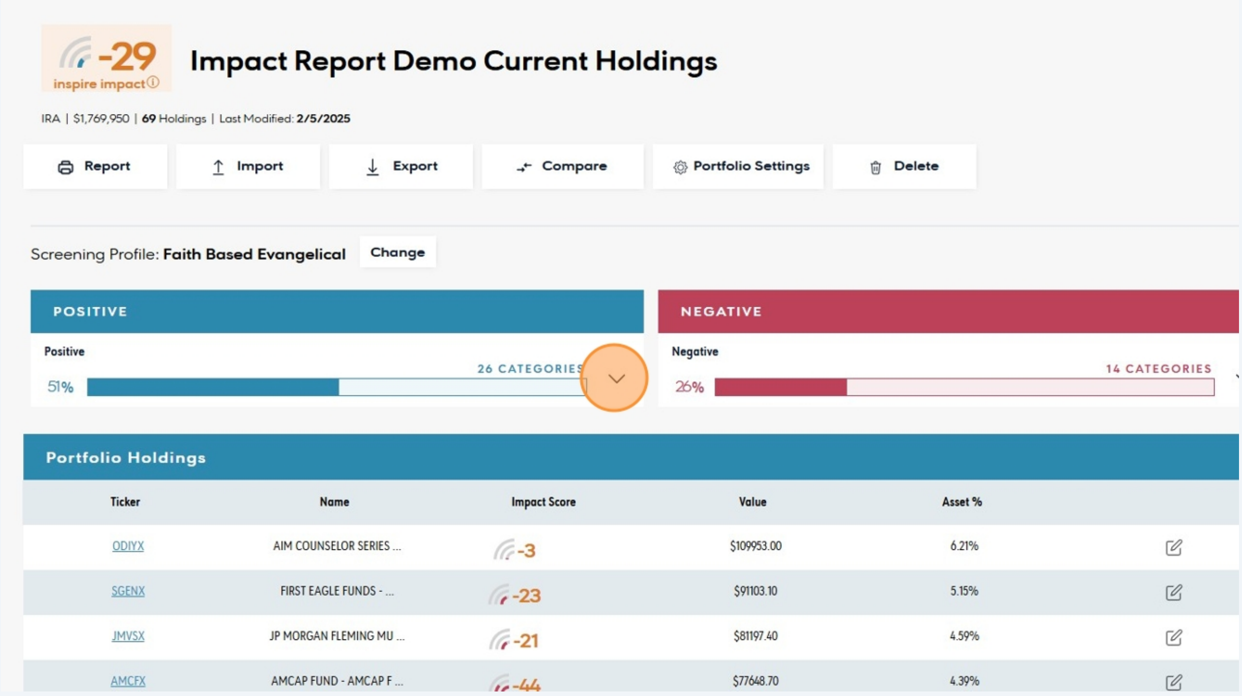


19 Ensure all holdings were imported and click the X to close

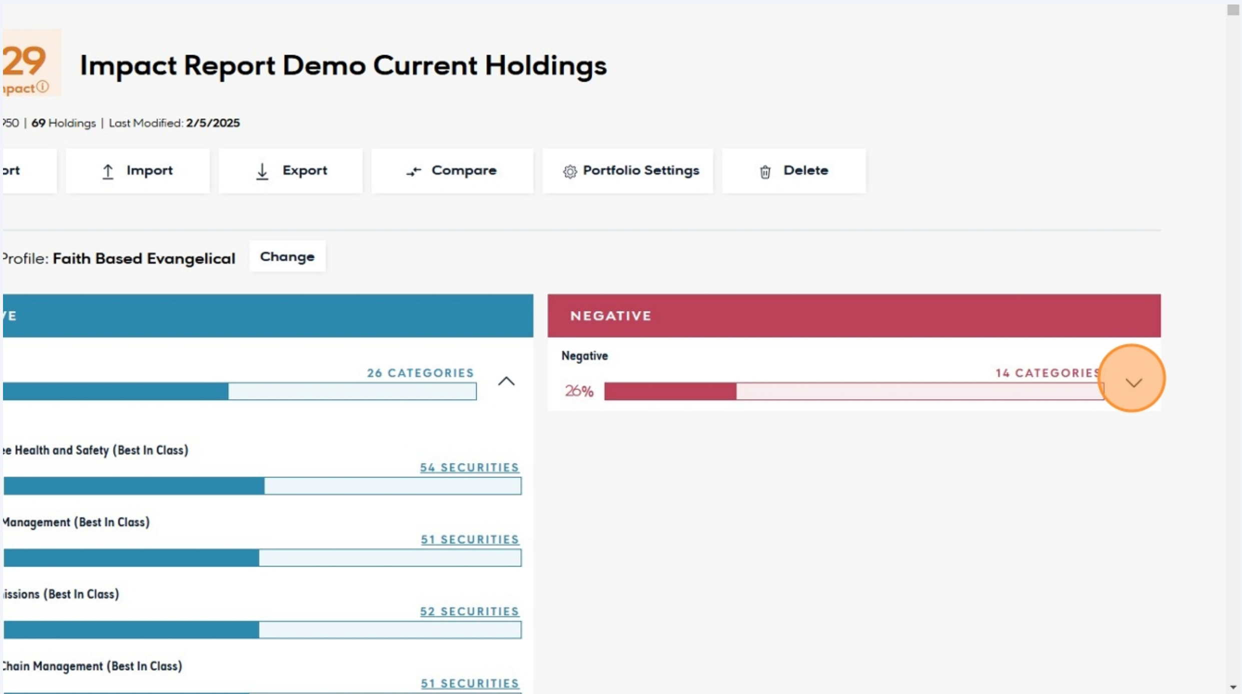




20 Click to Expand the Positive Score (If you do not do this, it will not appear on the report)

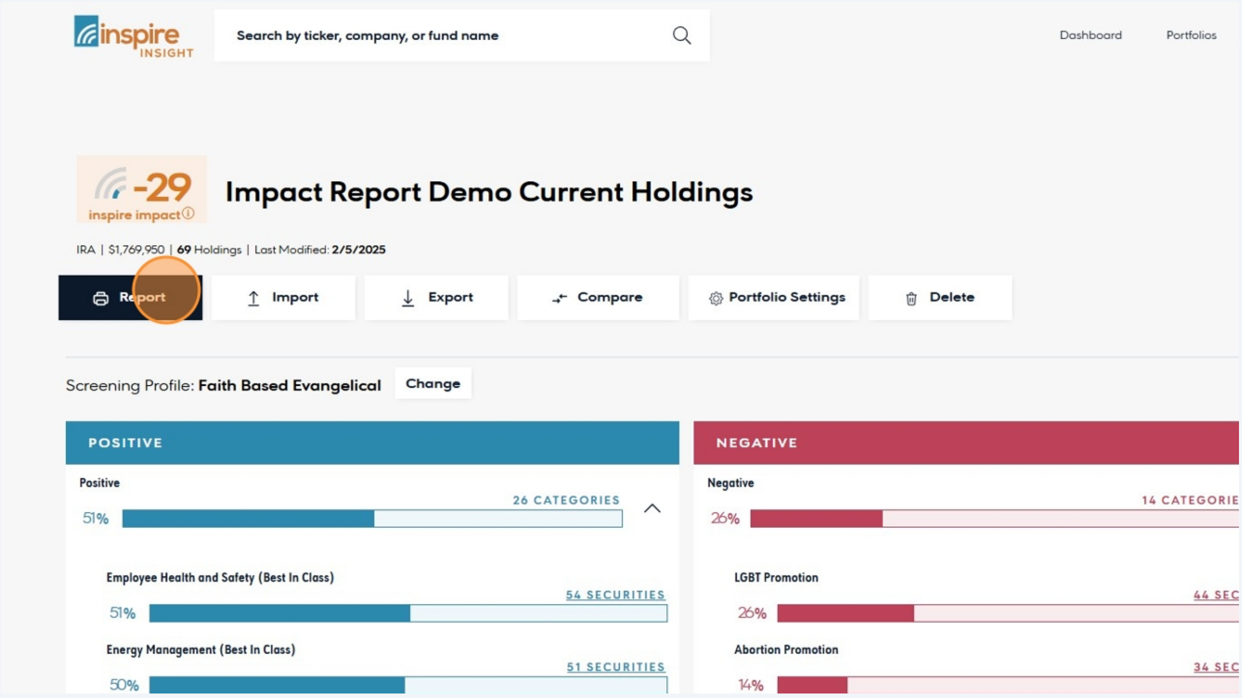


21 Click to Expand the Negative Score (If you do not do this, it will not appear on the report)

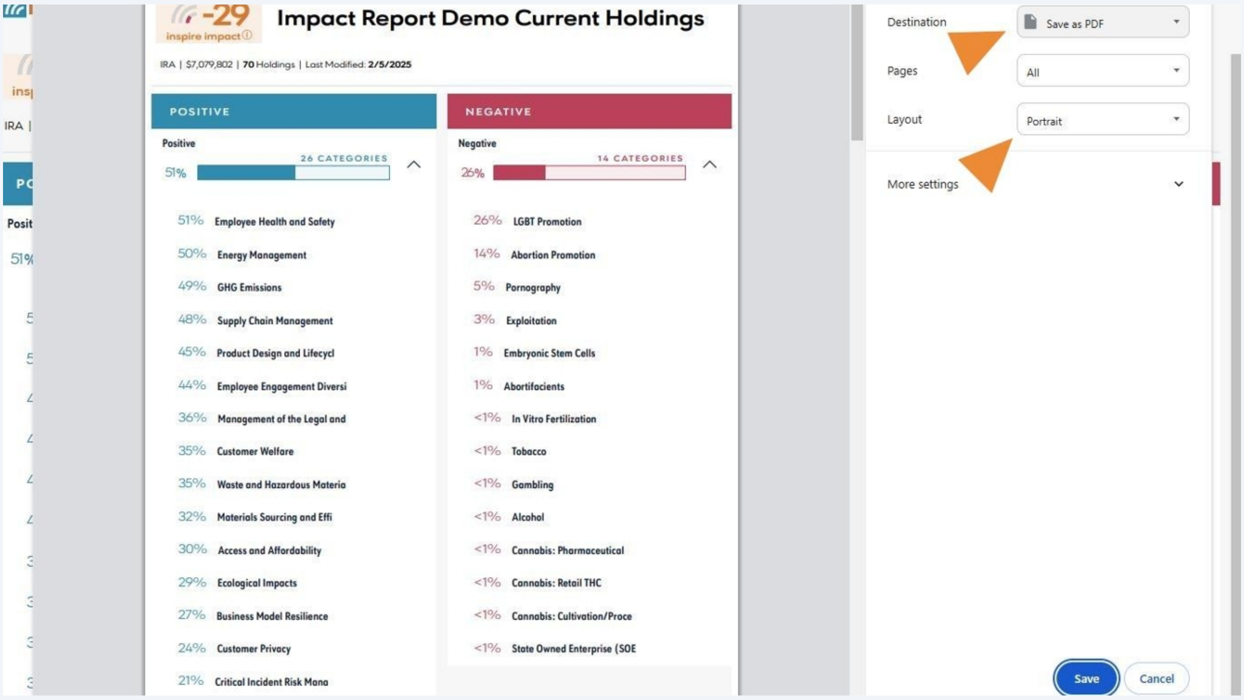


22 Total the portfolio and adjust the value and performance as needed.

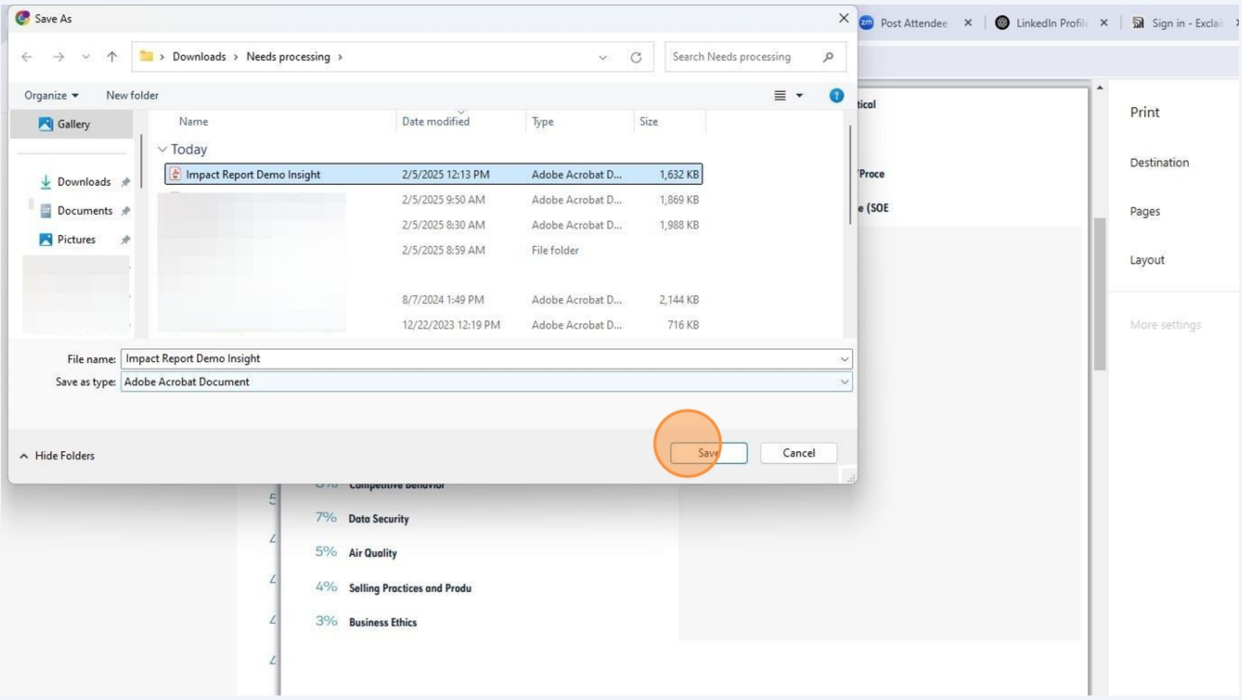
23 Click "Report"



24 Choose Save as PDF and click save and ensure it is in Portrait Layout

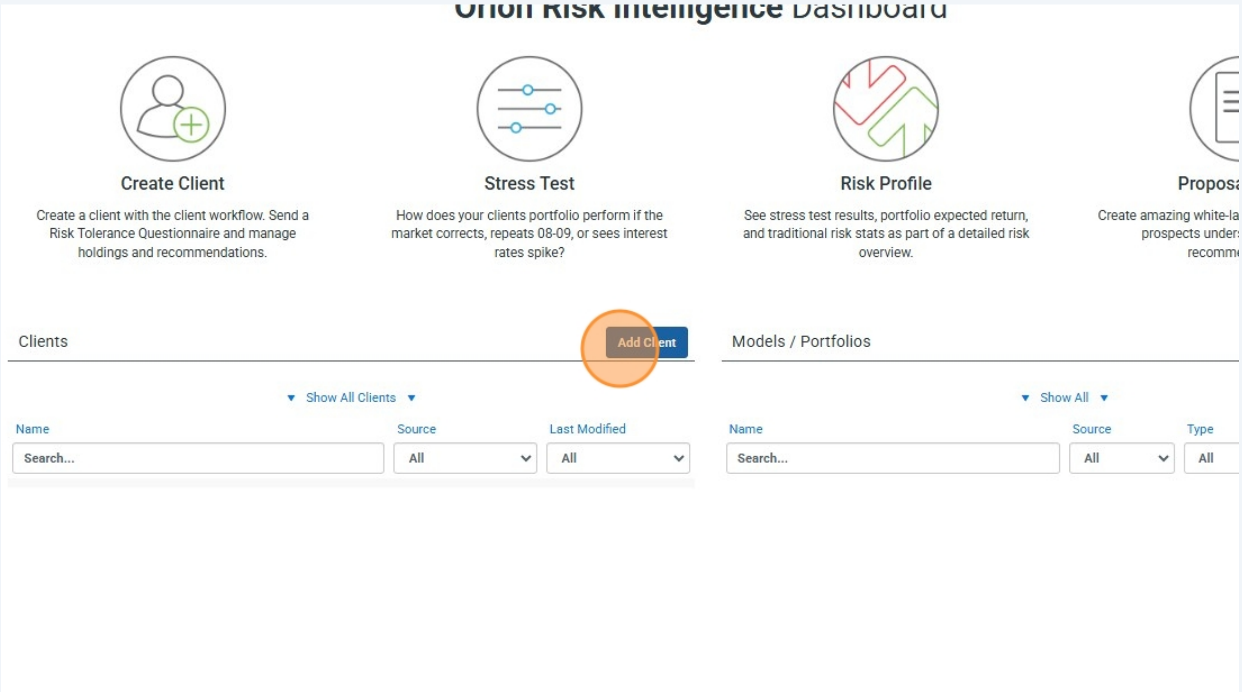


25 Save this somewhere you will be able to find it

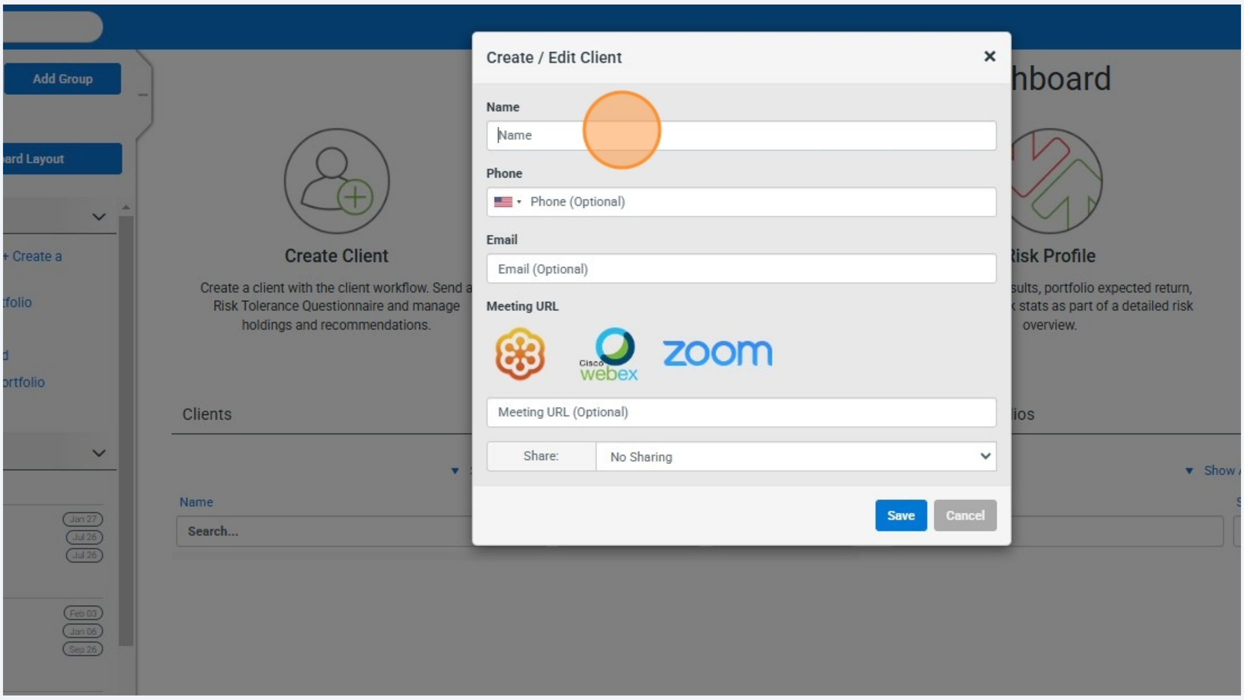


26 Navigate to https://www.hiddenlevers.com/l/

27 Click "Add Client"

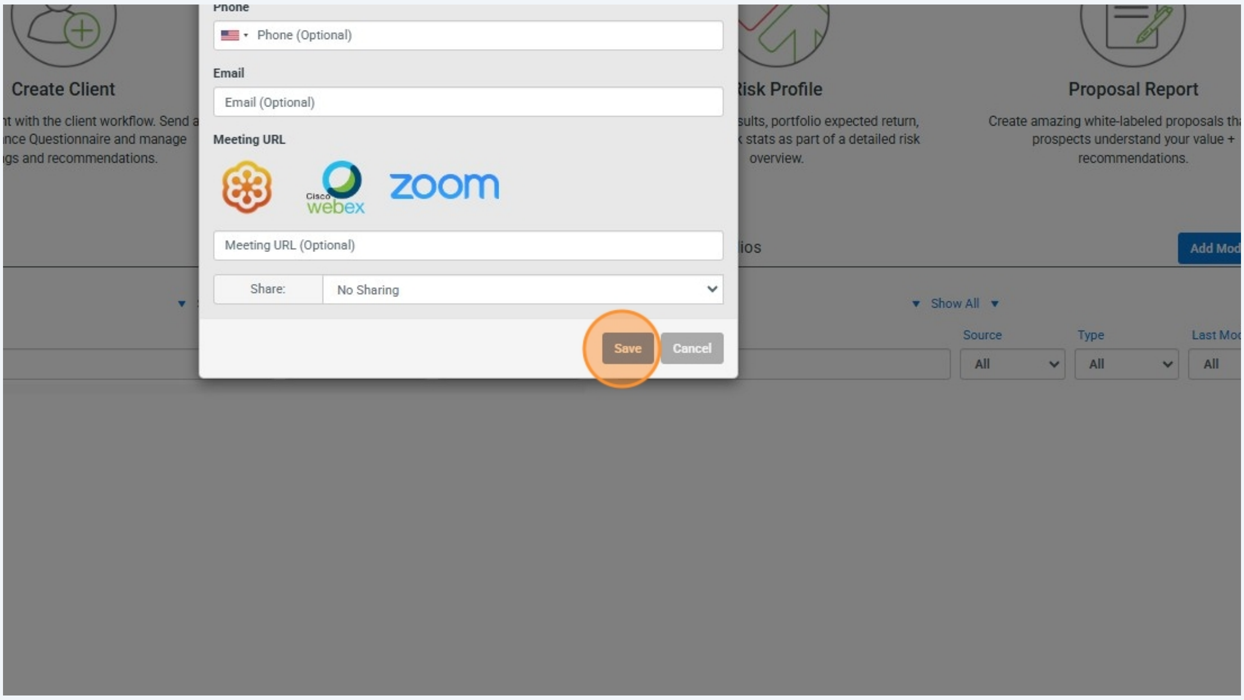


28 Click the "Name" field.

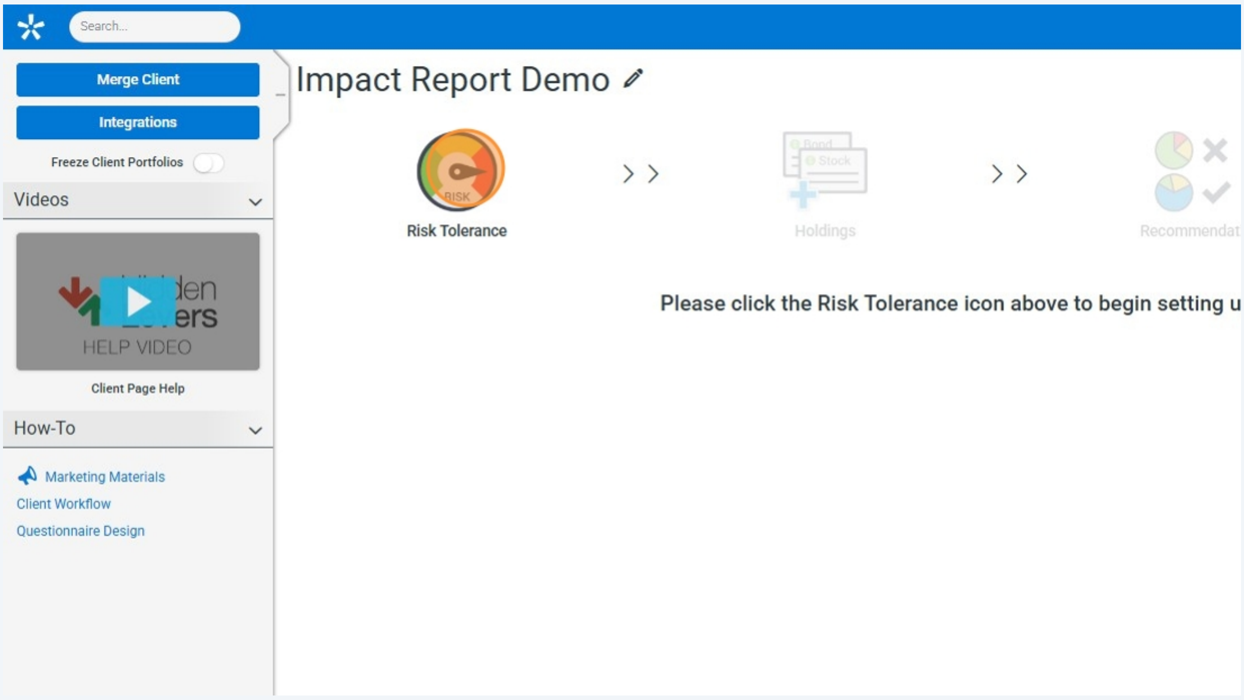


29 Type your client's name

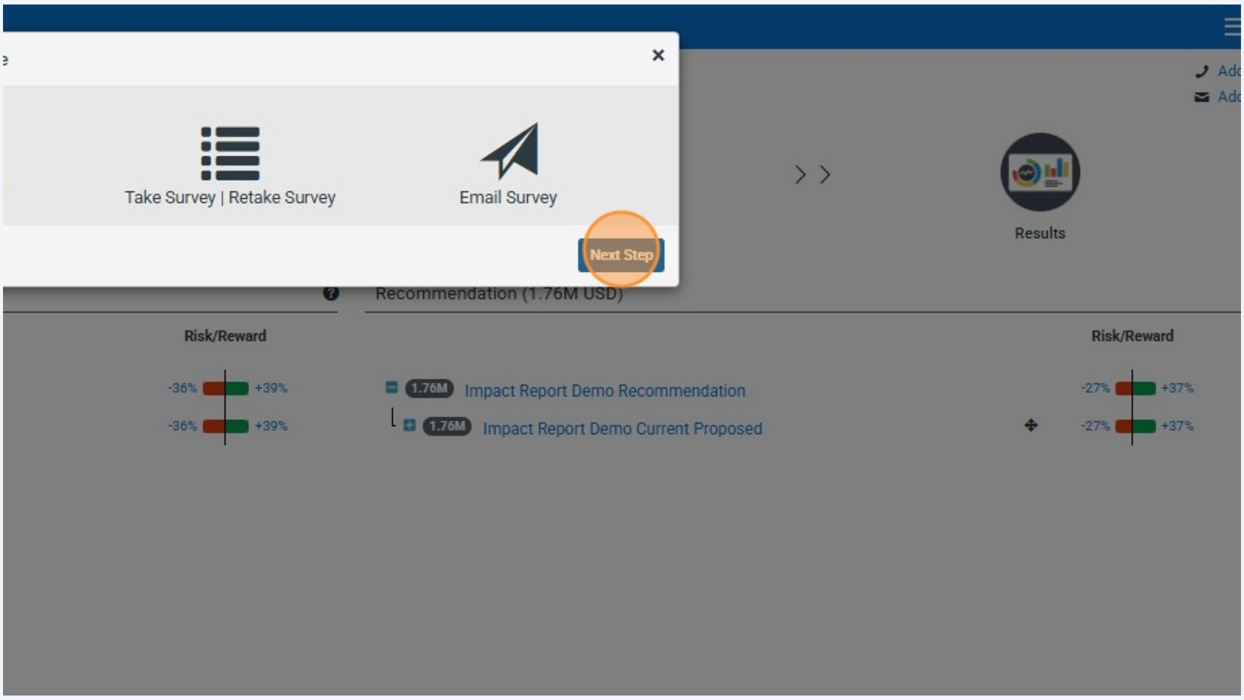
30 Click "Save"



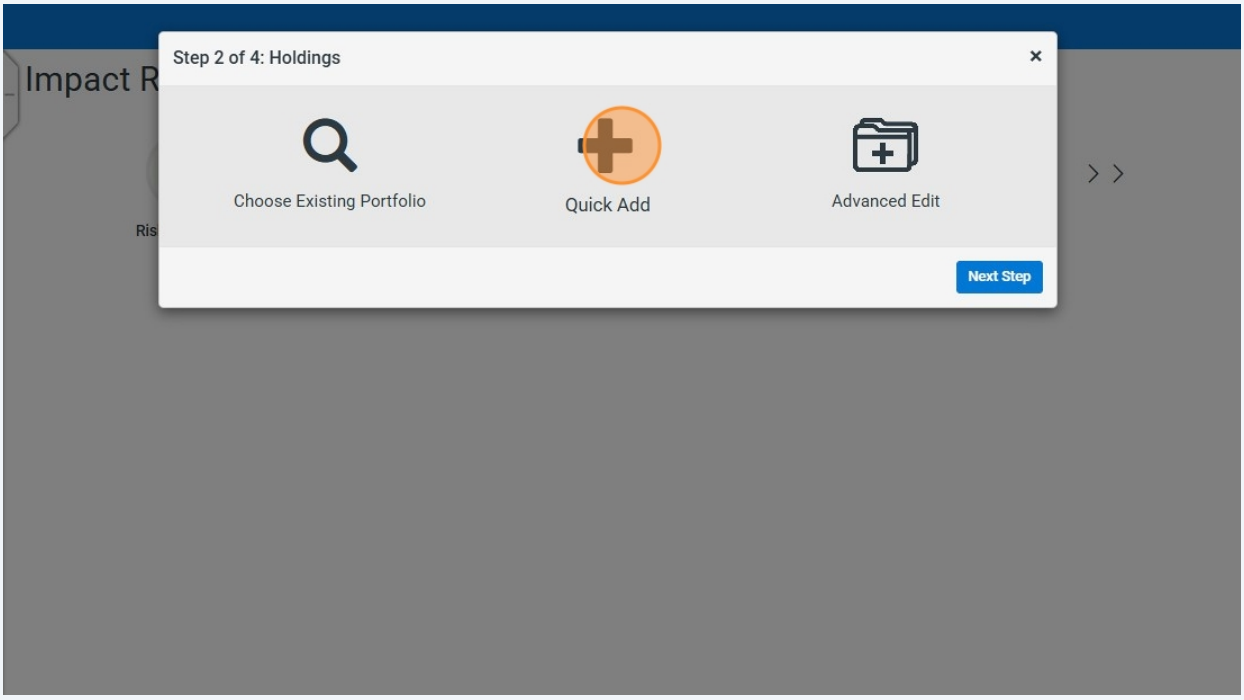
31 Click Risk Tolerance and enter manually or skip then click next step



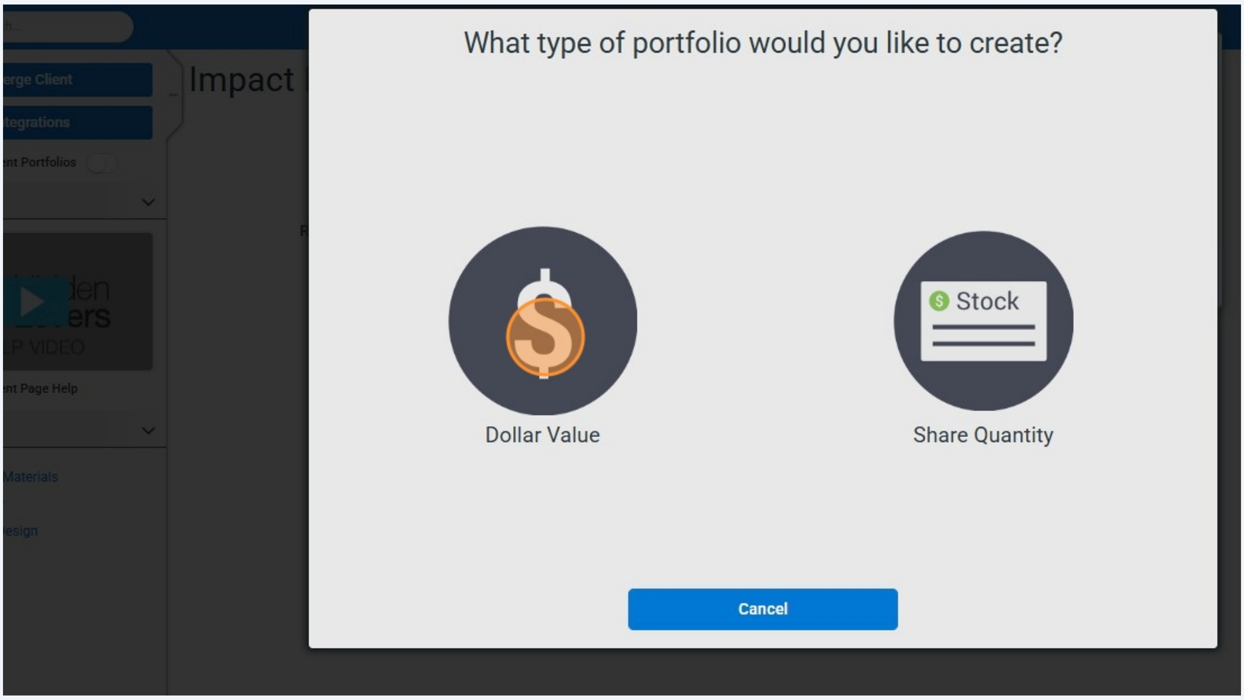
32 Enter the client's Risk Manually, or Skip by clicking next step.



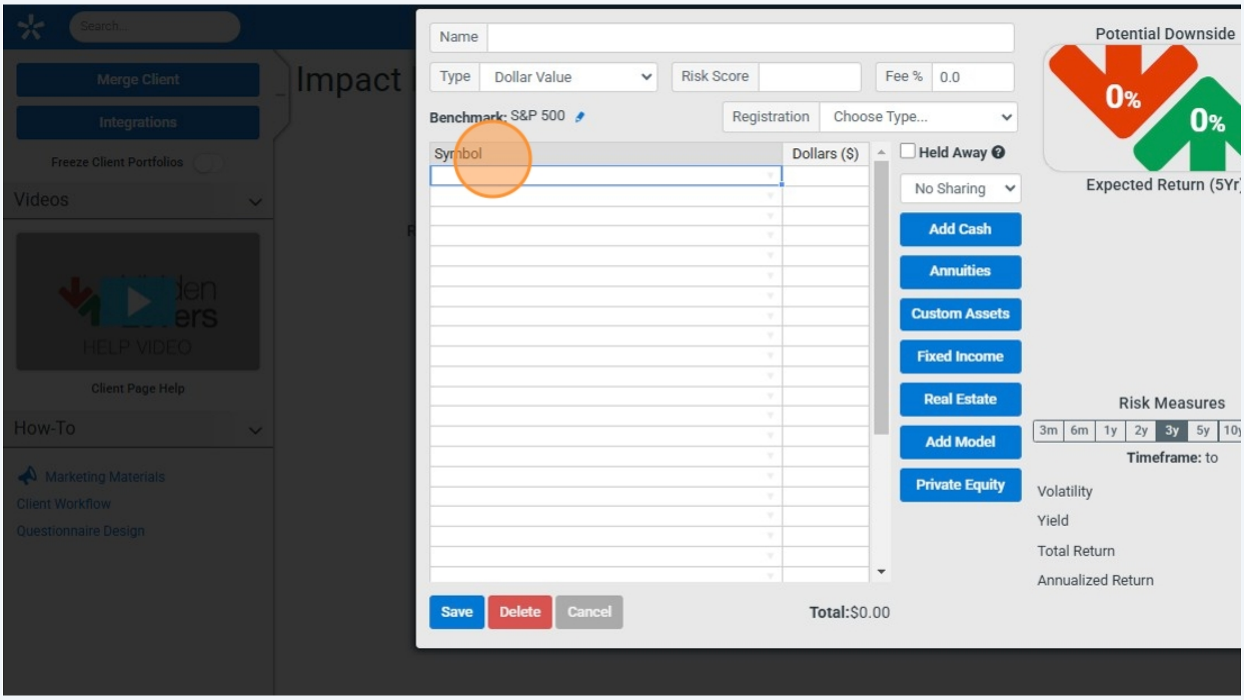
33 Click Quick Add



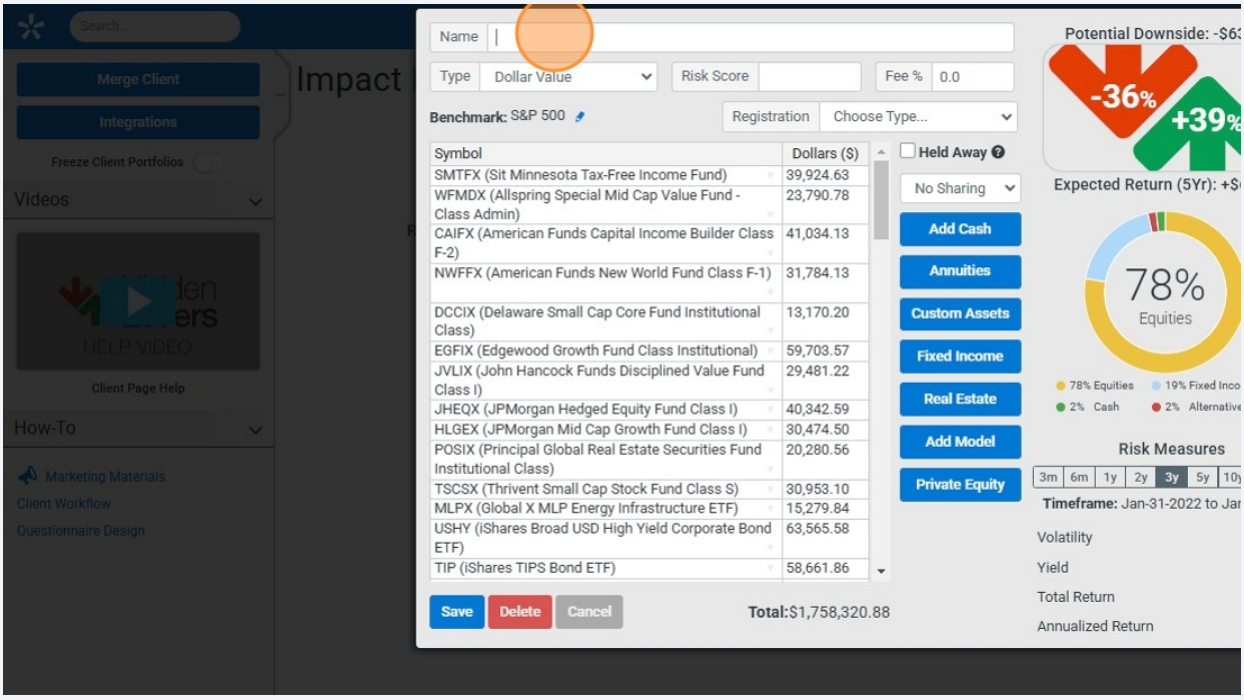
34 Choose Dollar value or share quantity



35 Import Client's current holdings. You can copy and paste from a spreadsheet

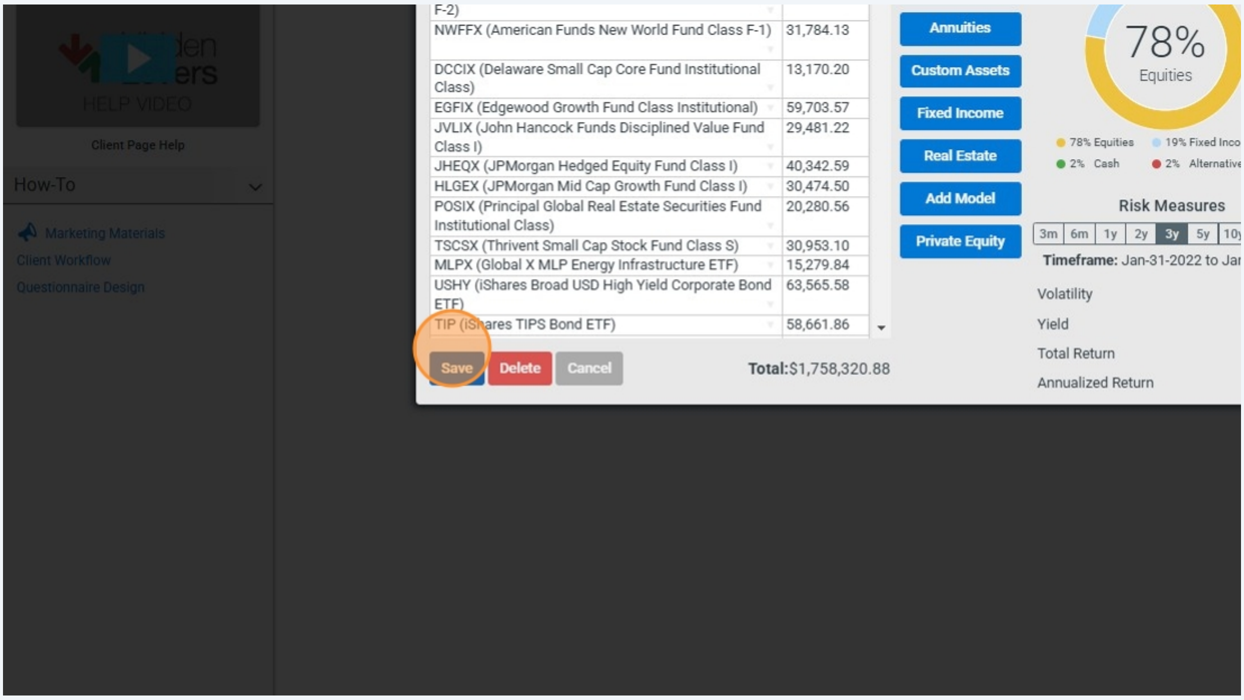


36 Click the "Portfolio Name" field.

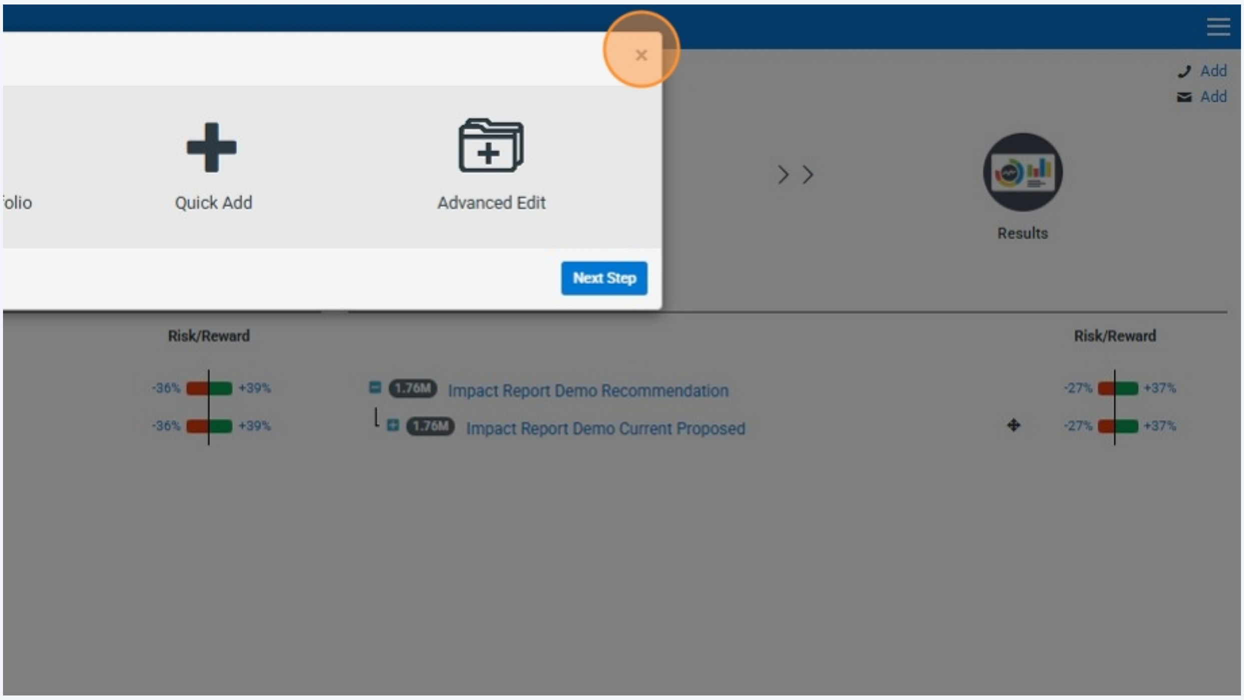


37 Name "Client's Name Current Holdings

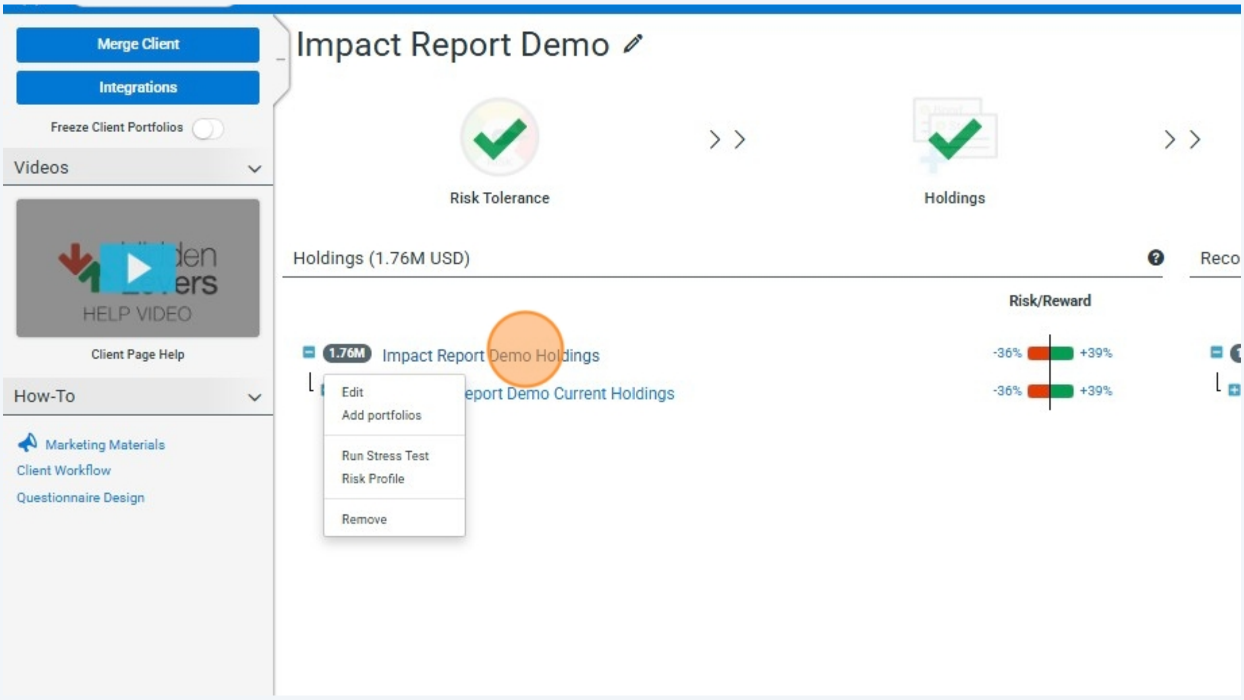
38 Click "Save"



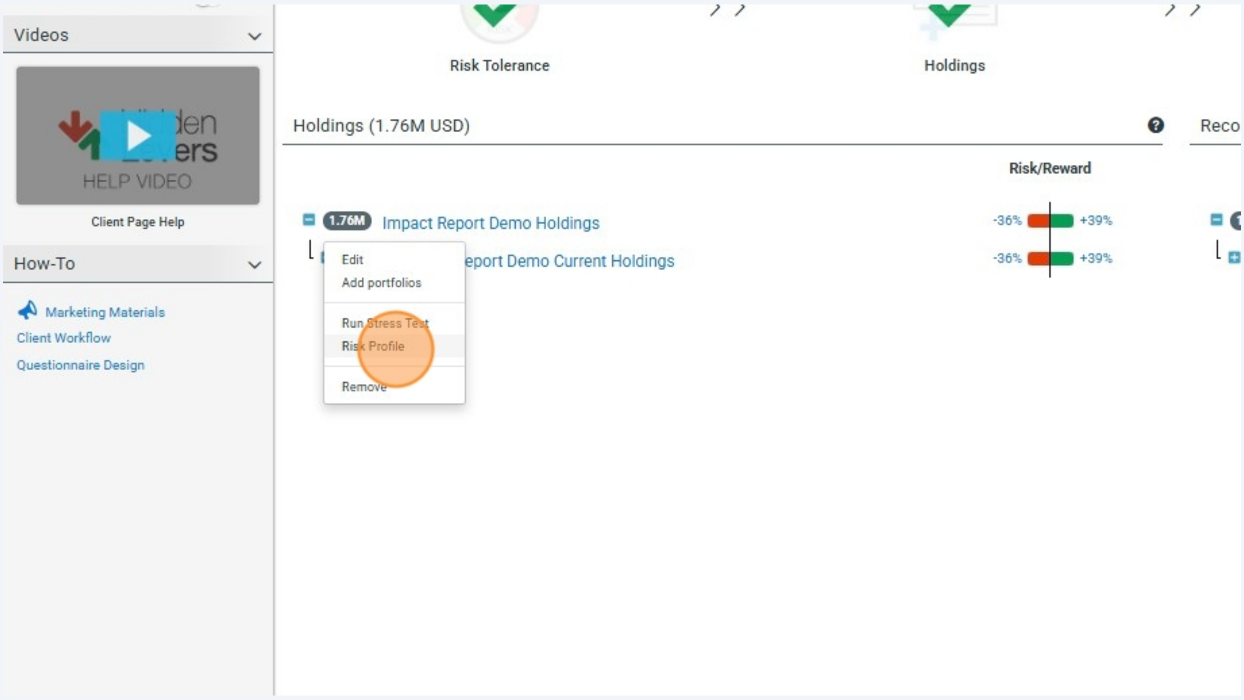
39 Close the next window



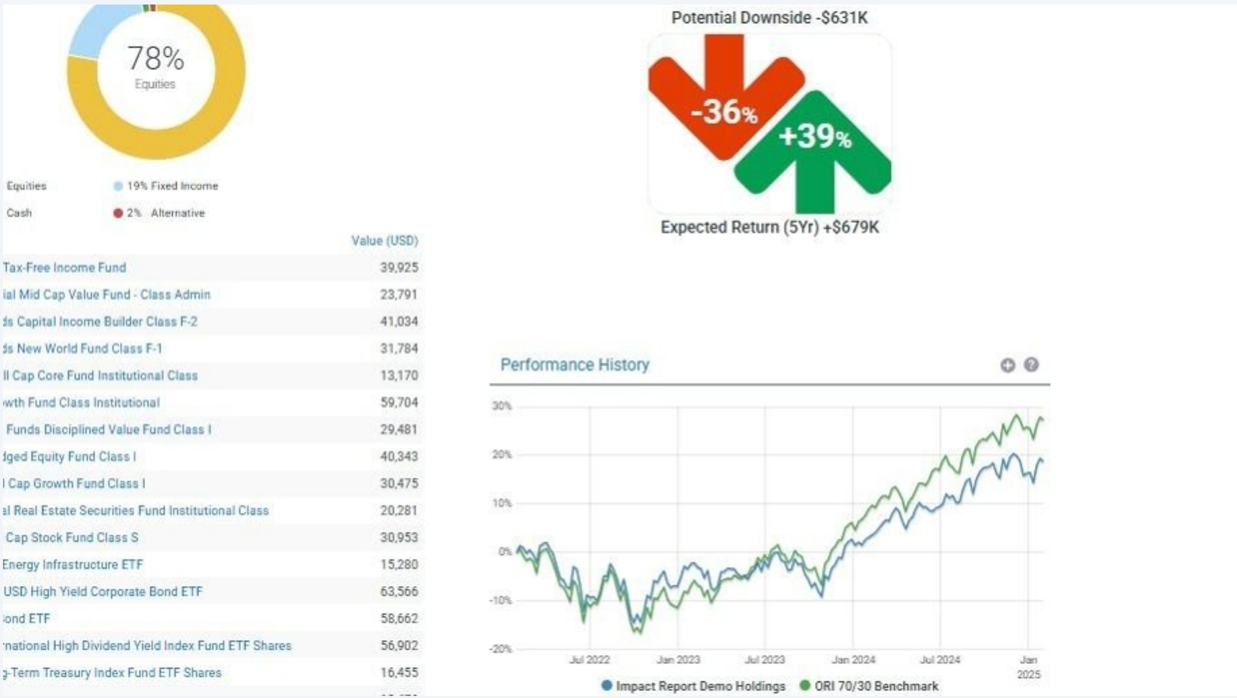
40 Click the top level existing holdings



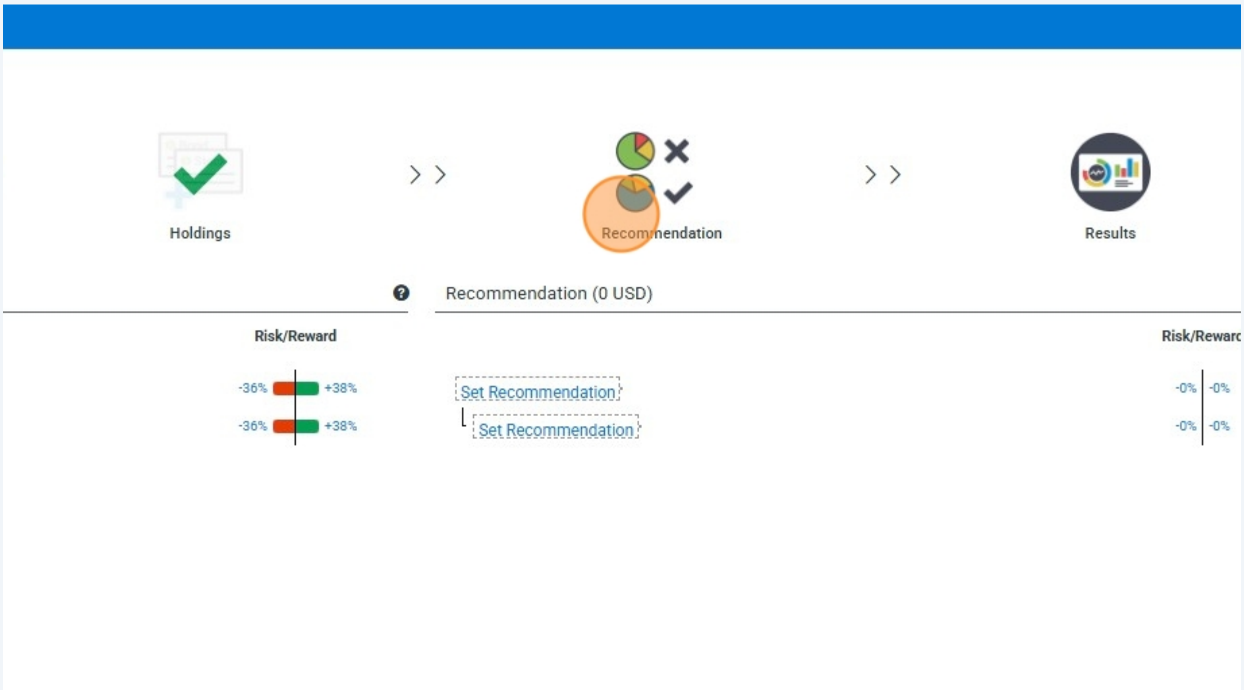
41 Right Click Risk Profile and open in a new window.



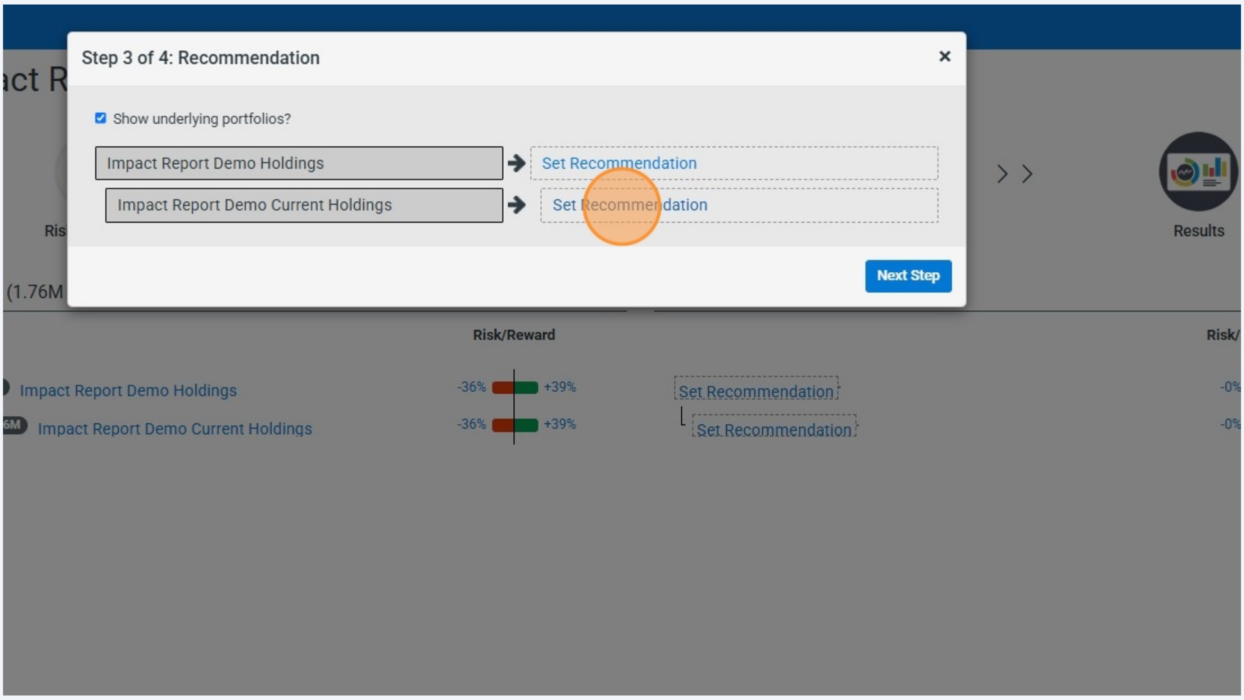
42 This will show you the clients current portfolio, allocation, risk and performance. Keep this window open for the next steps.



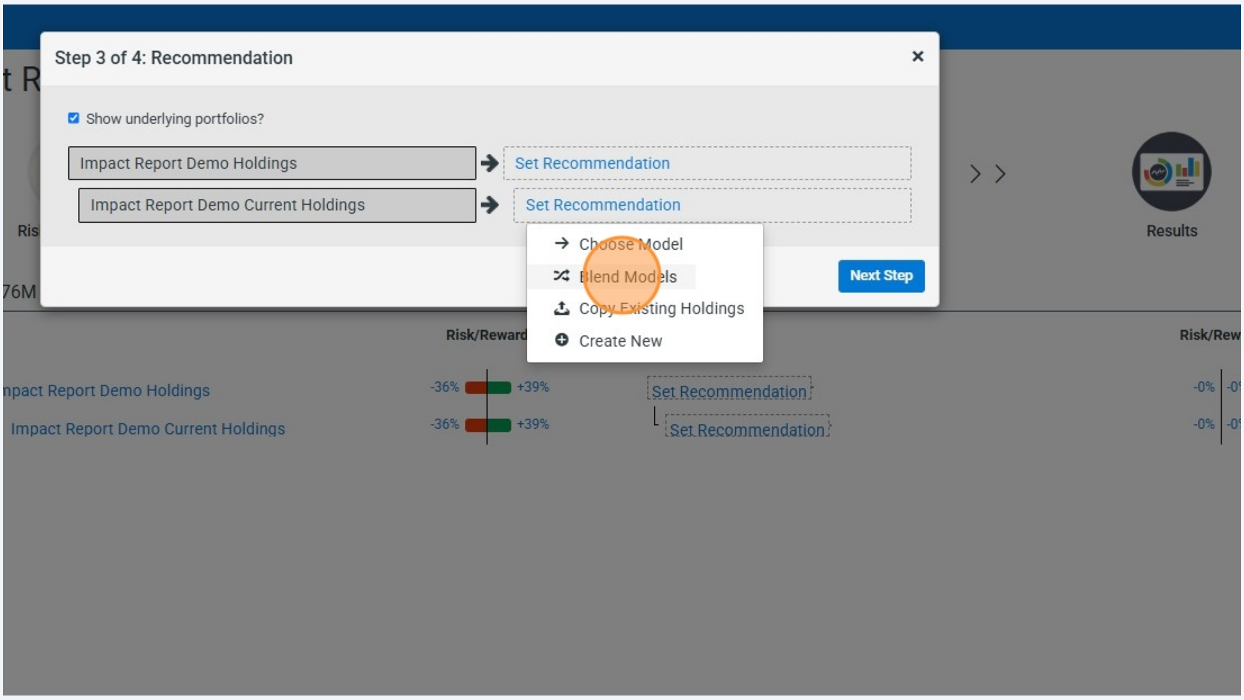
43 Click "Recommendation"



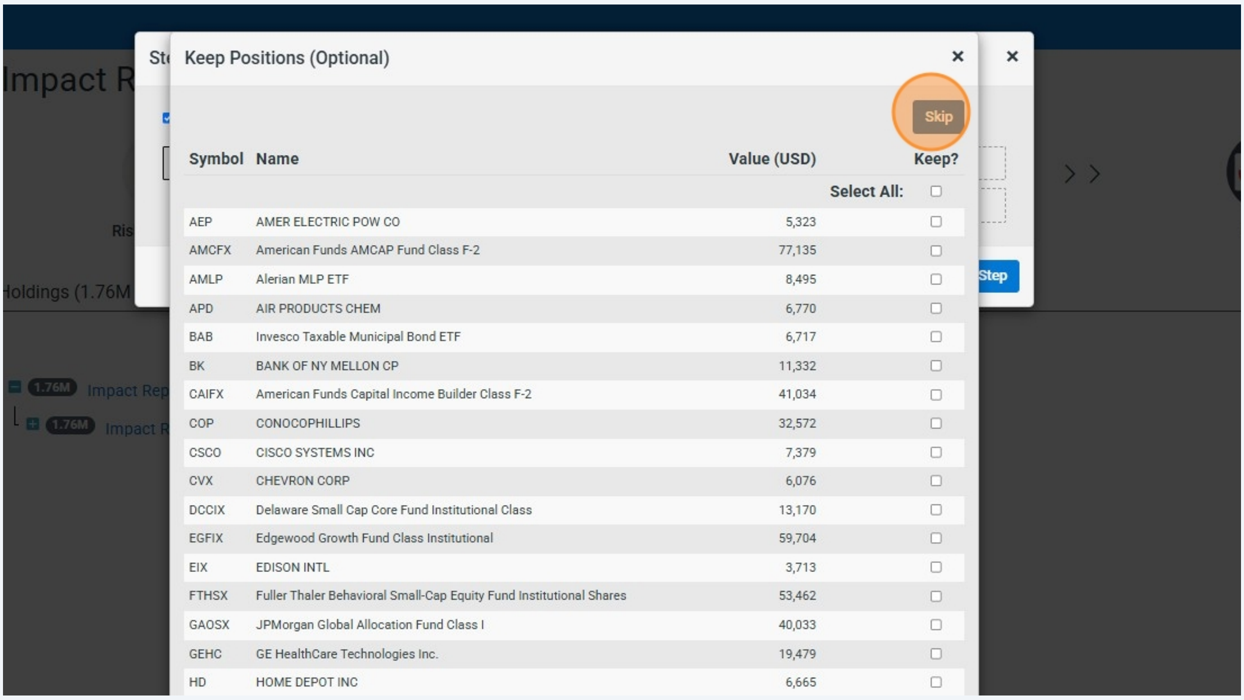
44 Click the lower "Set Recommendation"



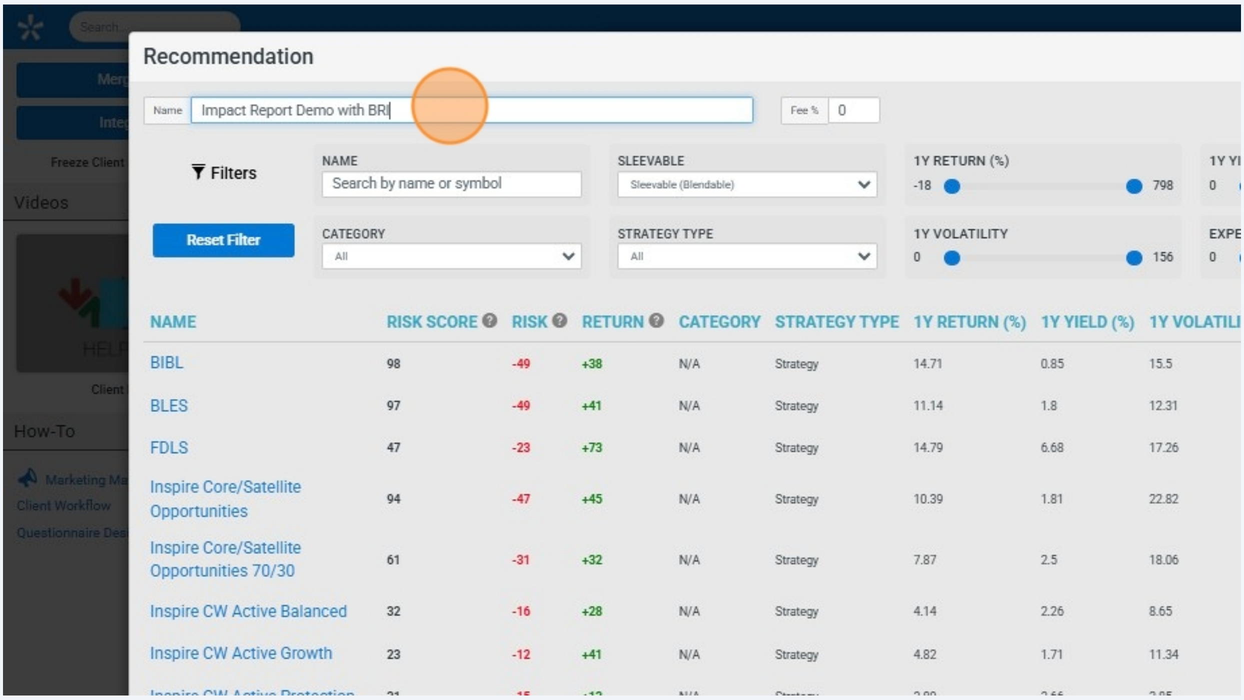
45 Click "Blend Models"



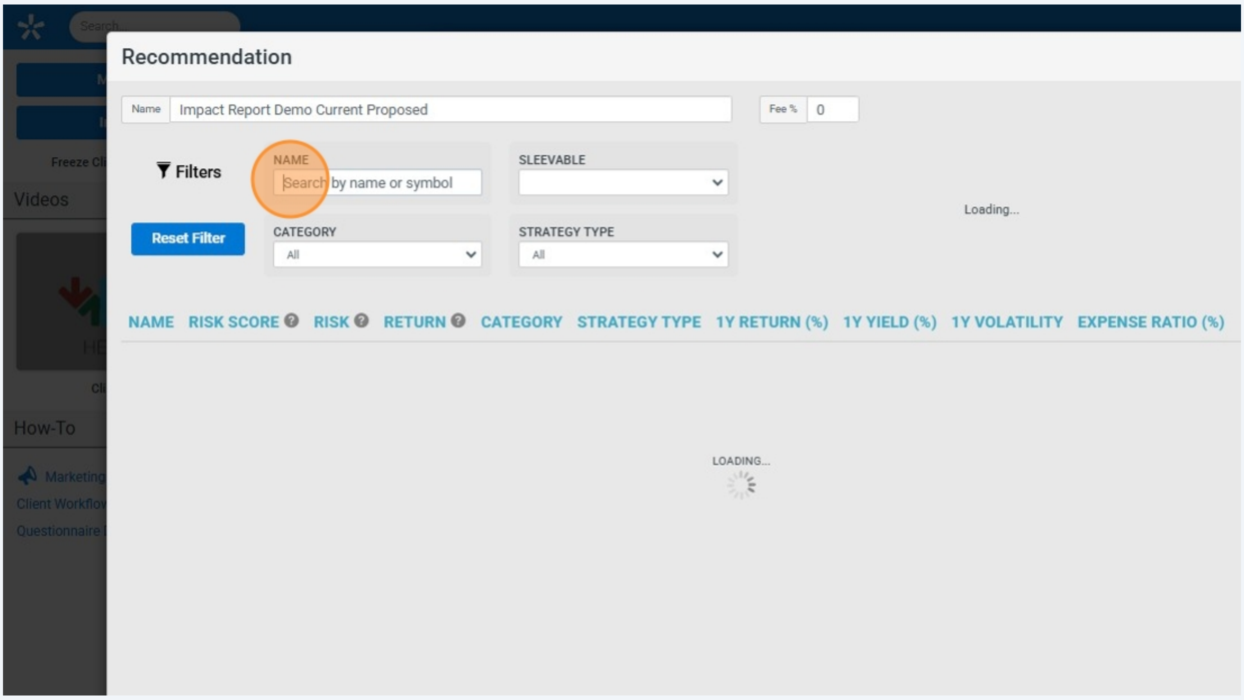
46 If you want to keep holdings, put a checkmark next to them and click save at the bottom. Otherwise click skip



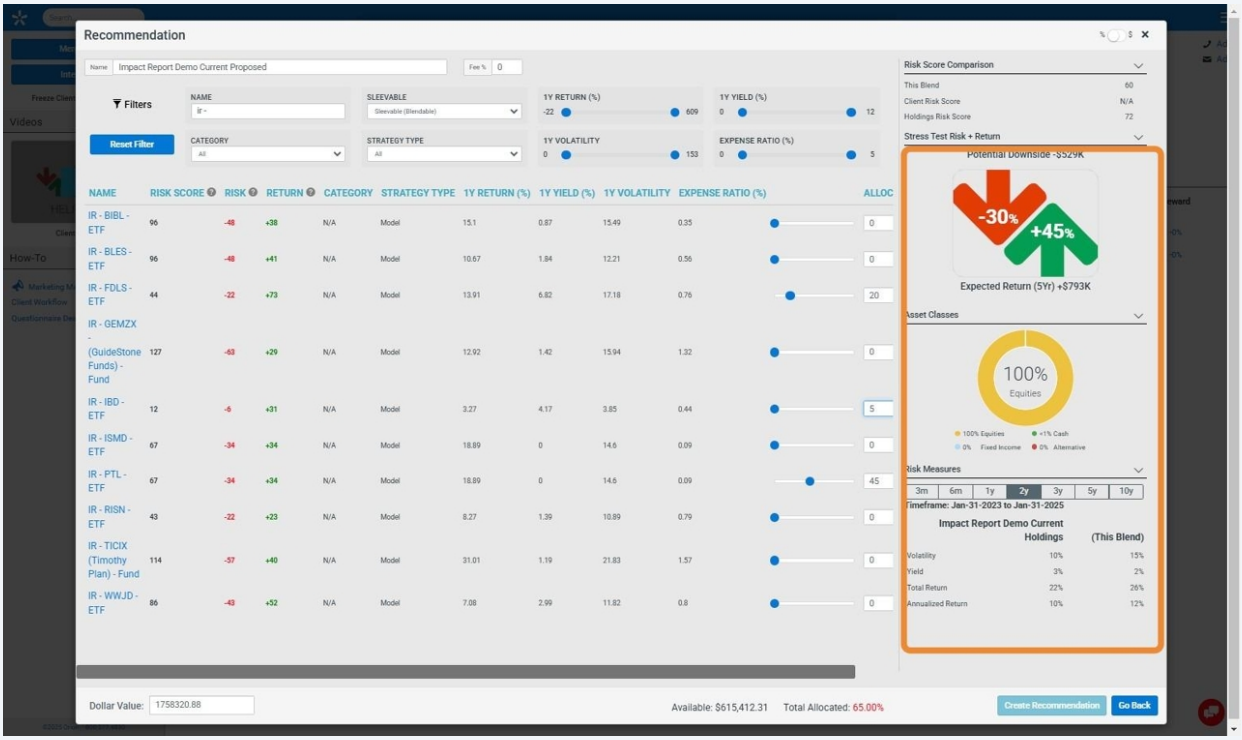
47 Click on the name field and type "client's name" with BRI



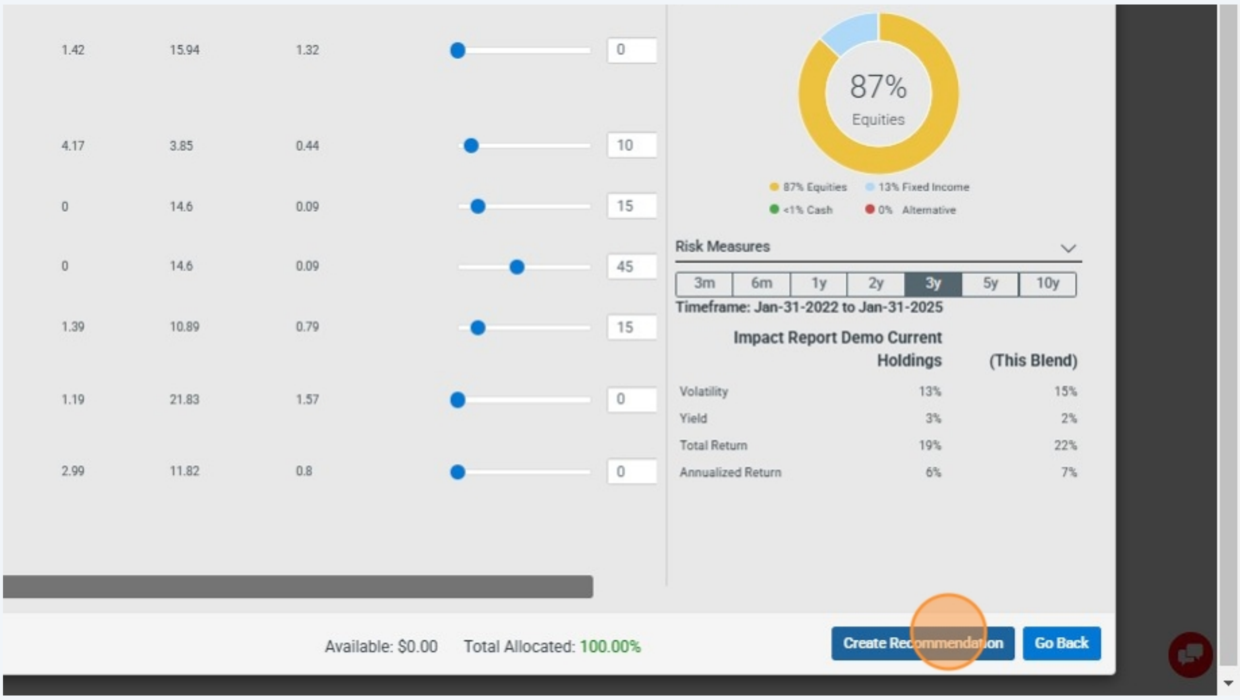
48 Click the search field and type "IR" - (this will filter down to only the recommended funds)



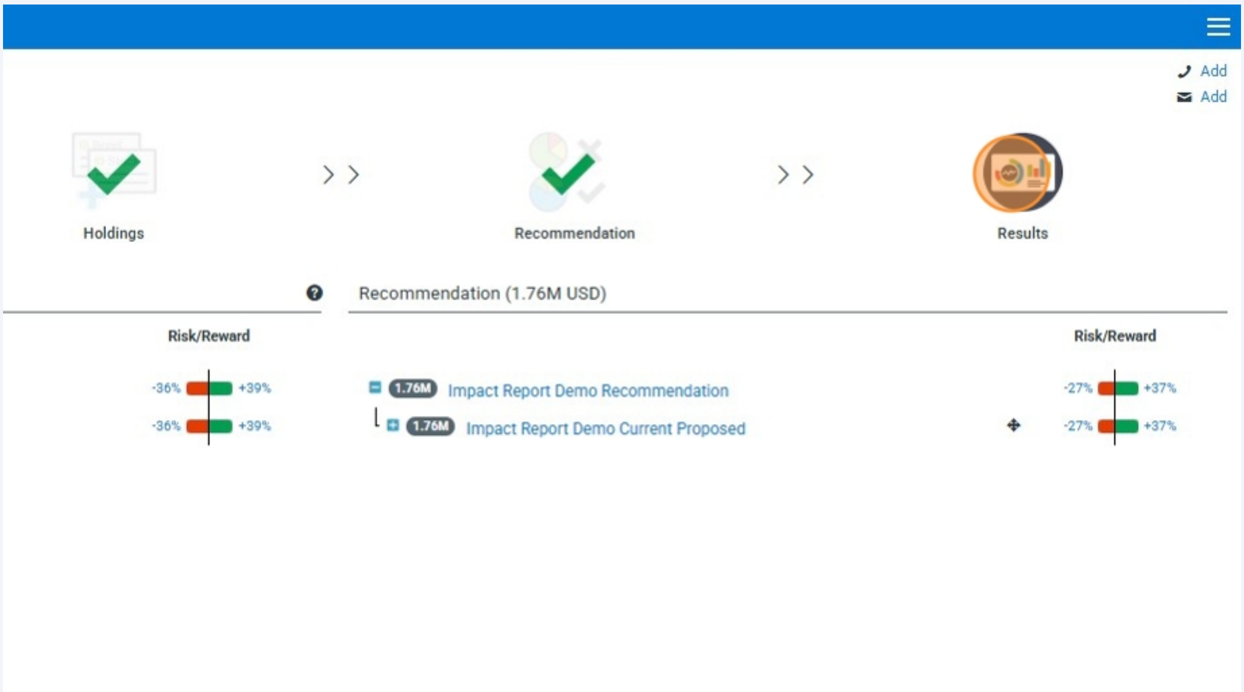
49 Change around the percentages of each until the allocation an performance is satisfactory to you



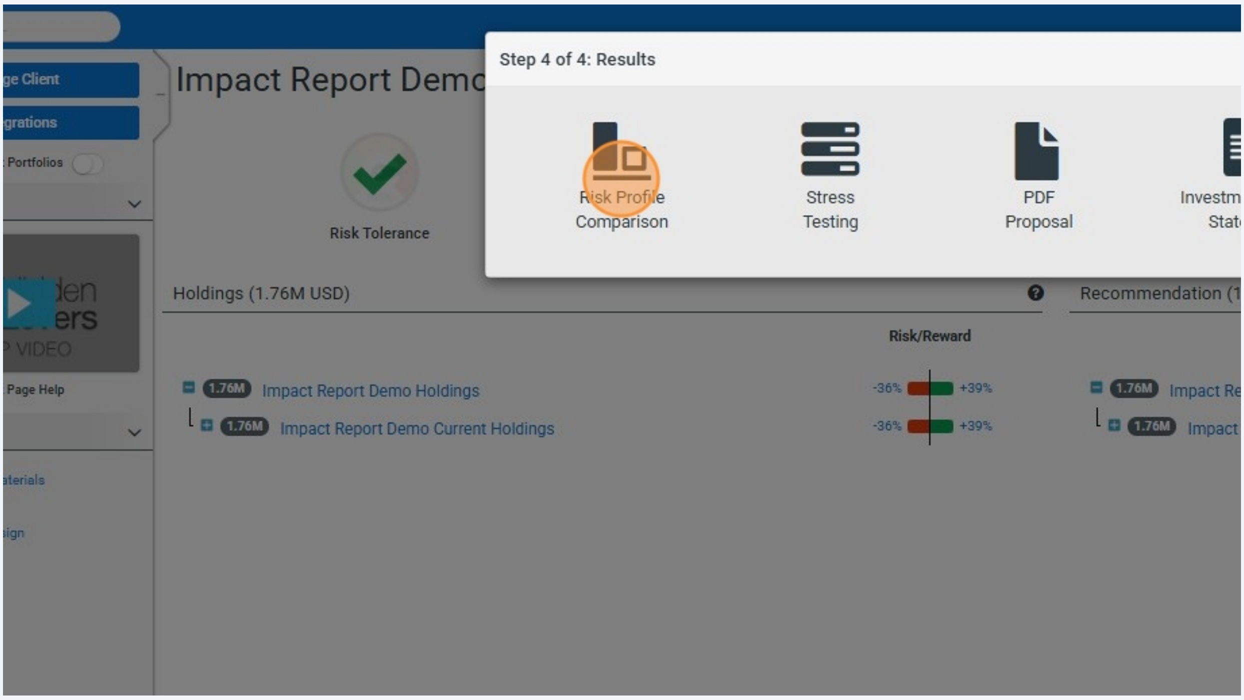
50 Once you are satisfied with the Recommendation - Click create Recommendation



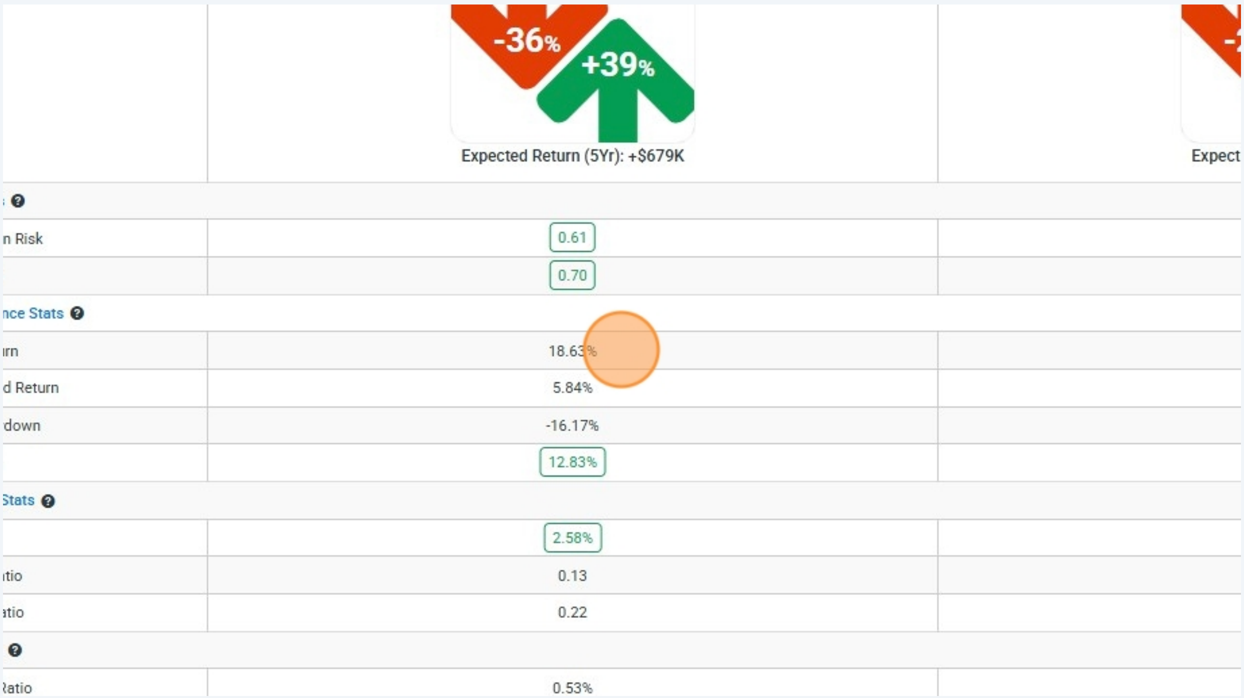
51 Click the Results Button

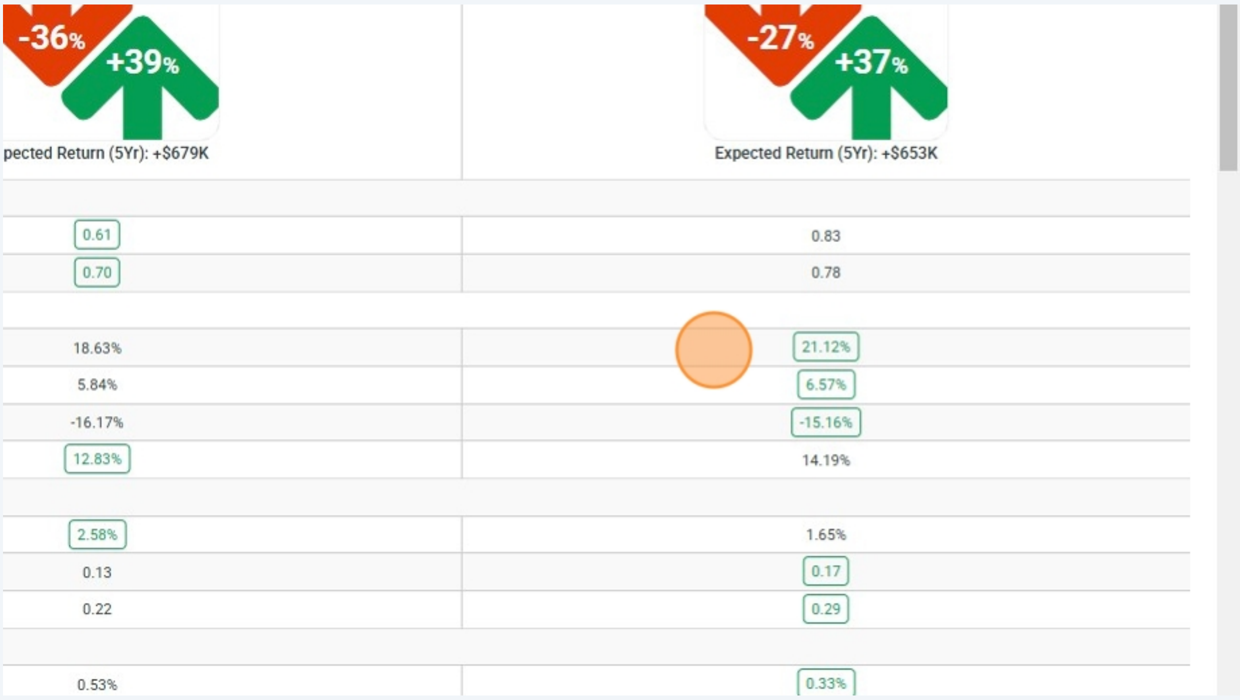


52 Then click the Risk Profile Comparison

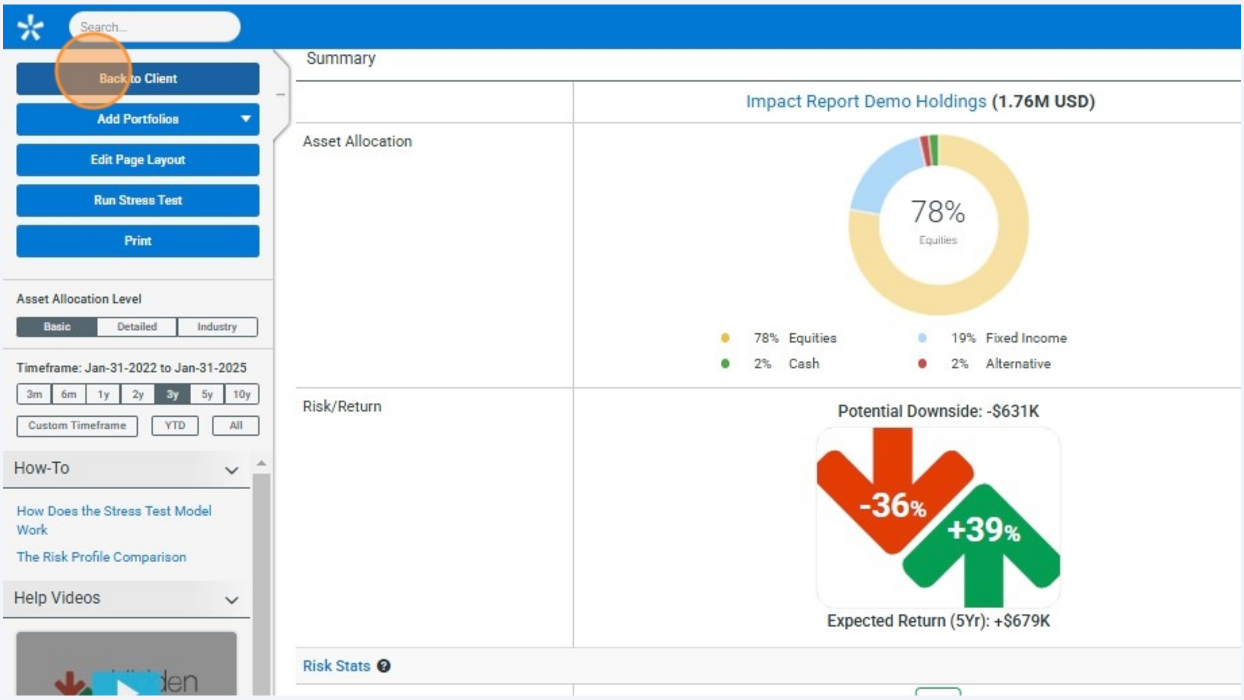


53 Review the performance and risk stats to ensure the comparison is to your liking

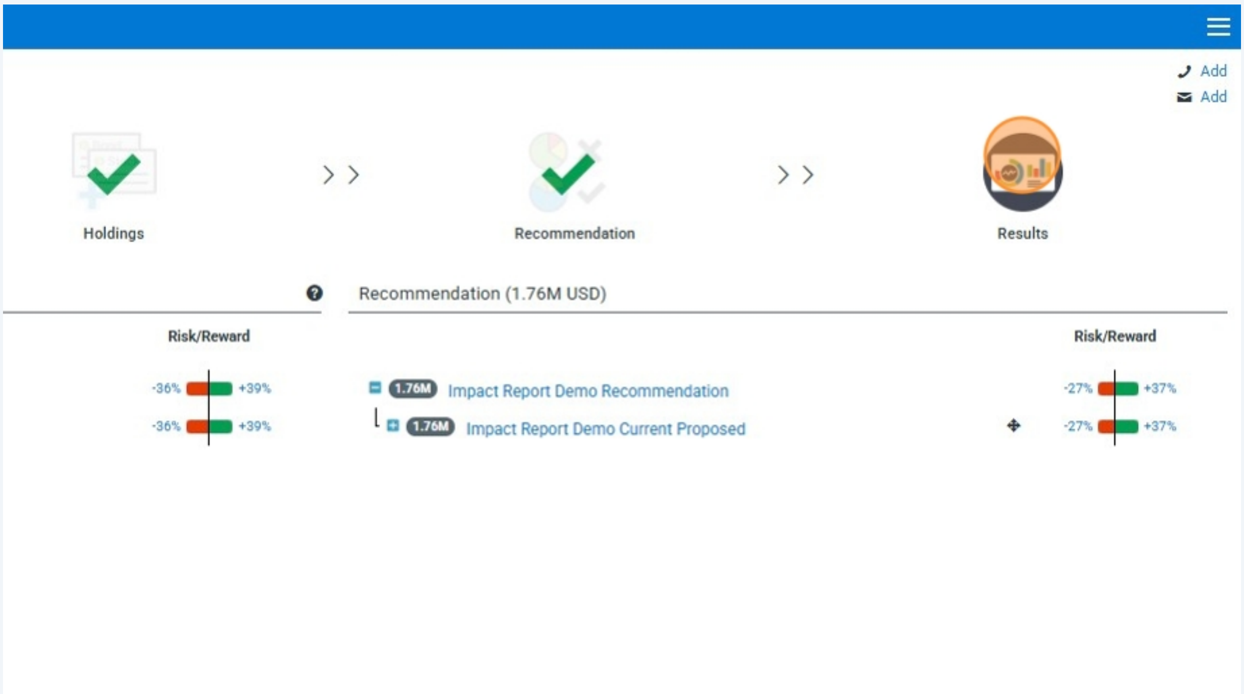




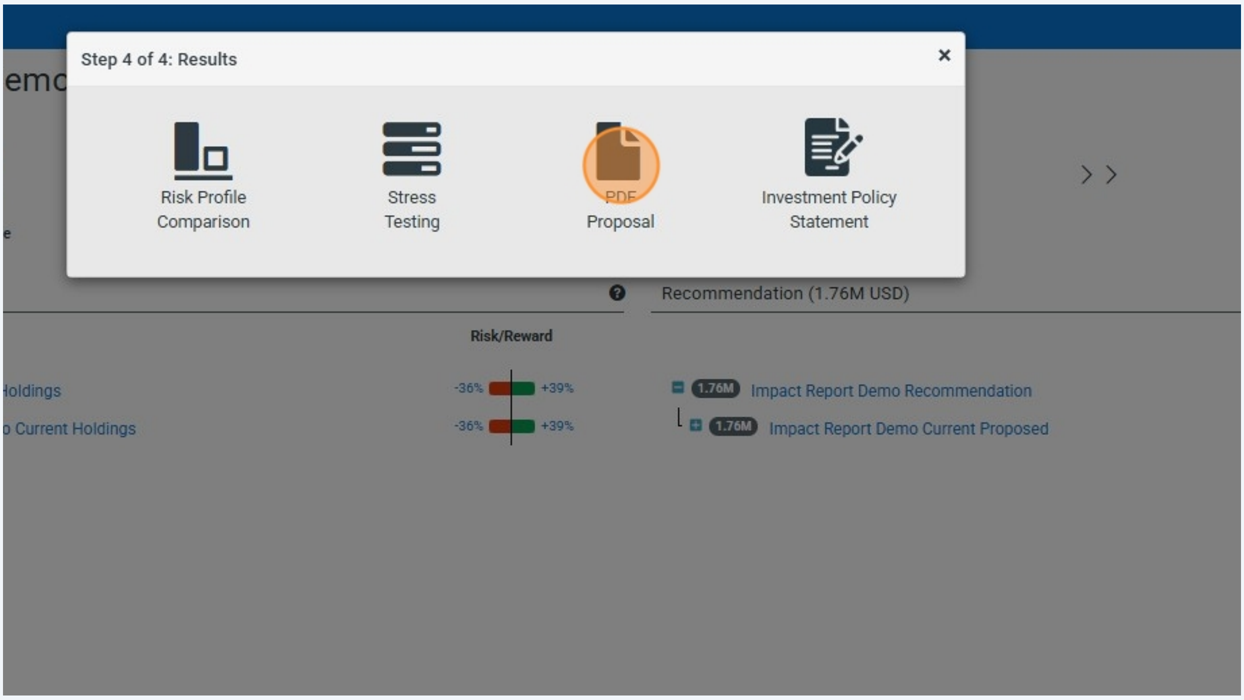
54 Click "Back to Client"



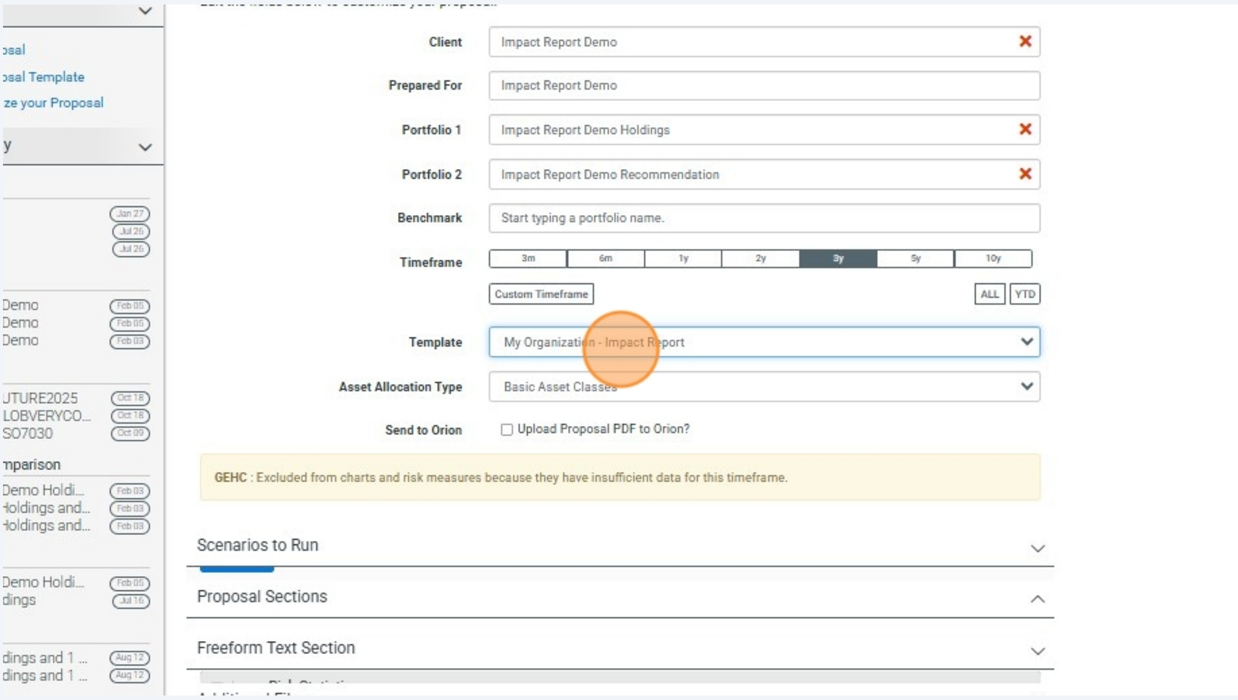
55 Click the Results button



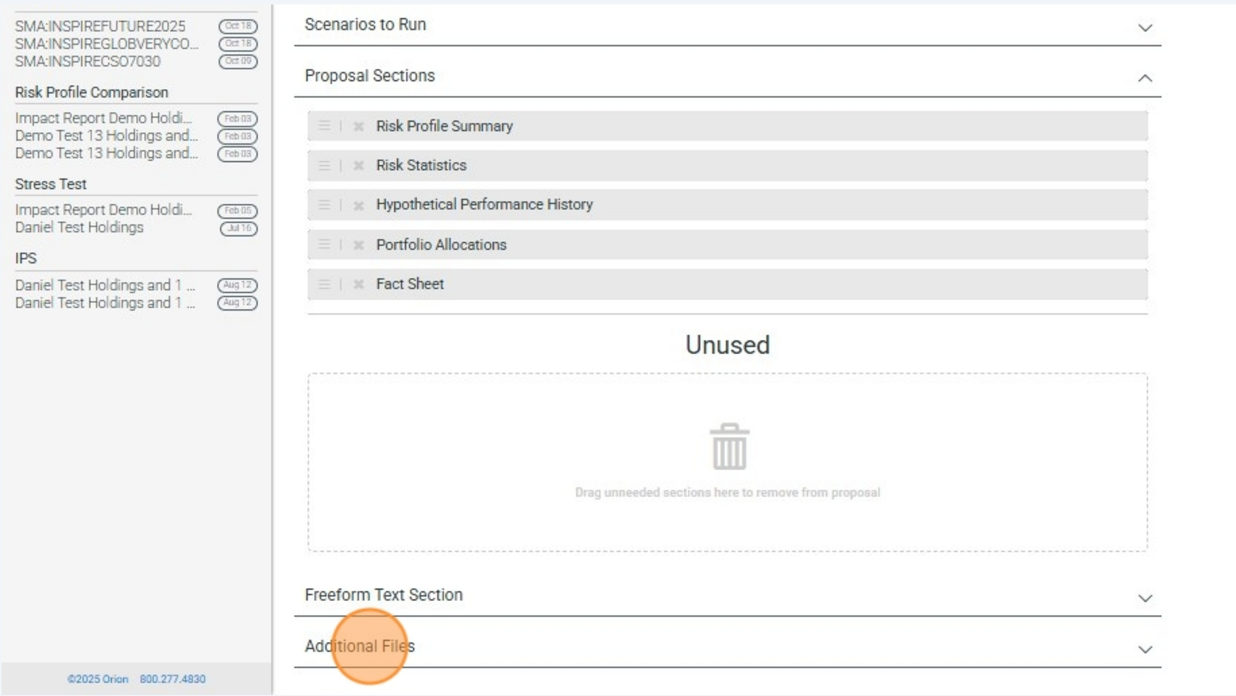
56 Click PDF proposal



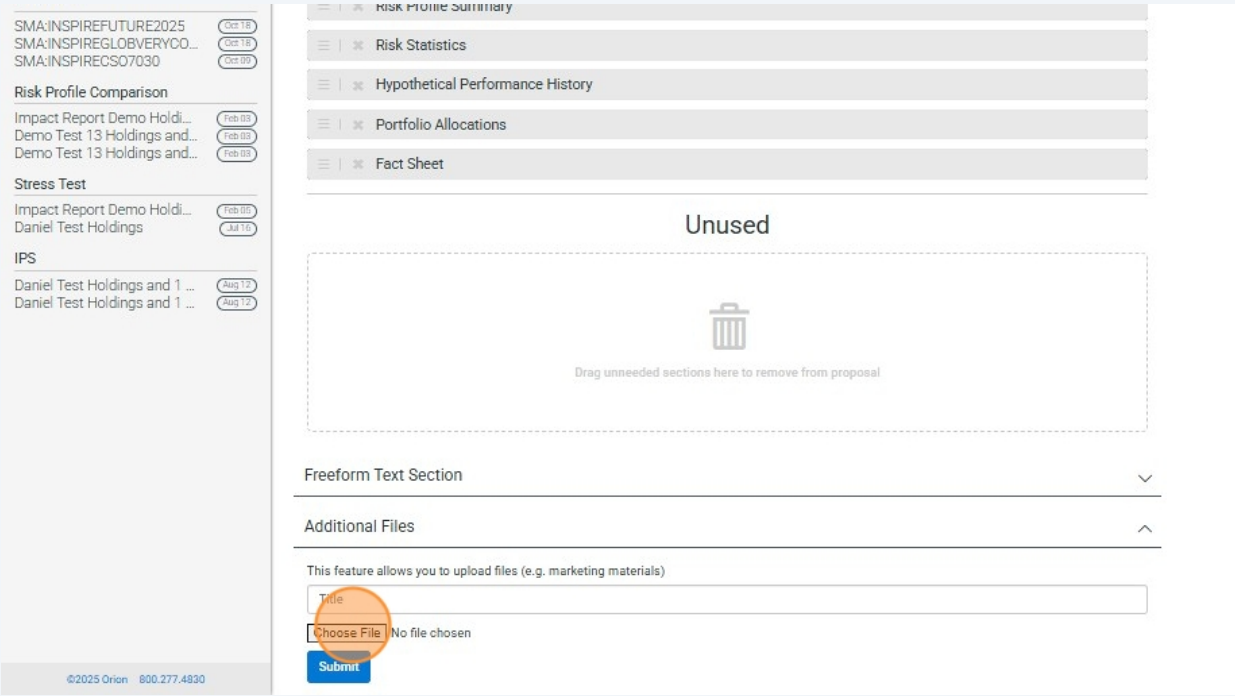
57 Select My Organization - Impact Report. This is something we have built to satisfy our criteria. You may use this or create your own.



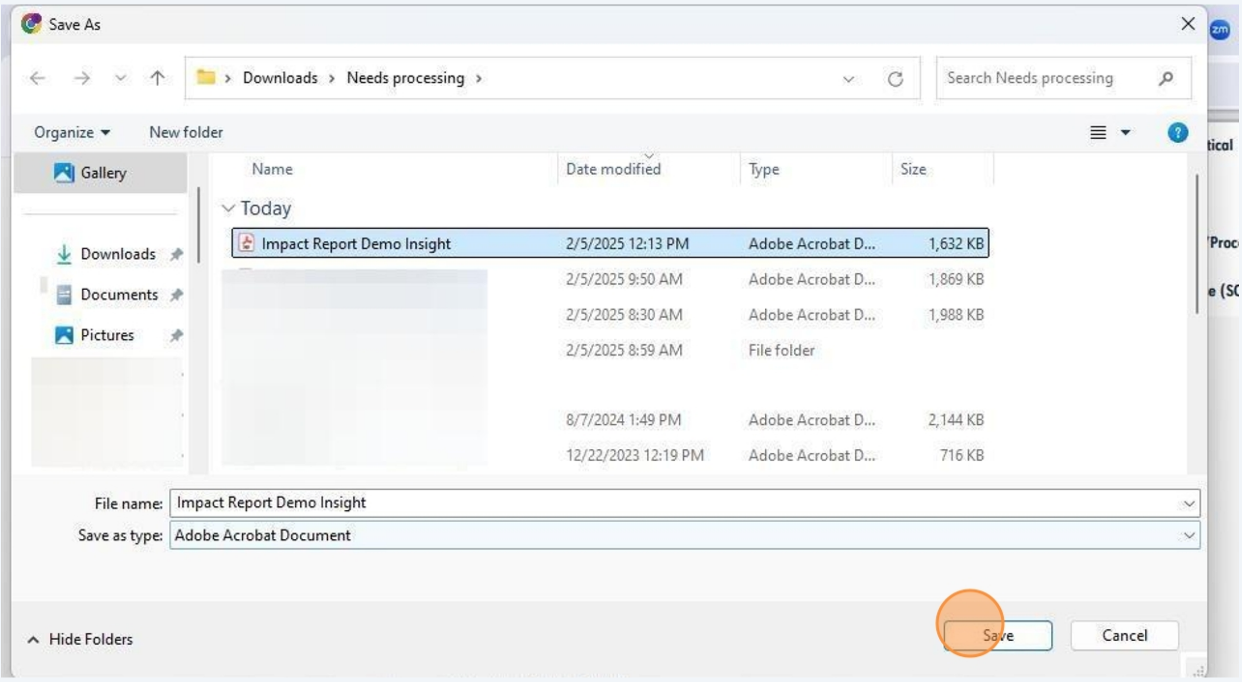
58 Click the drop down called "Additional Files"



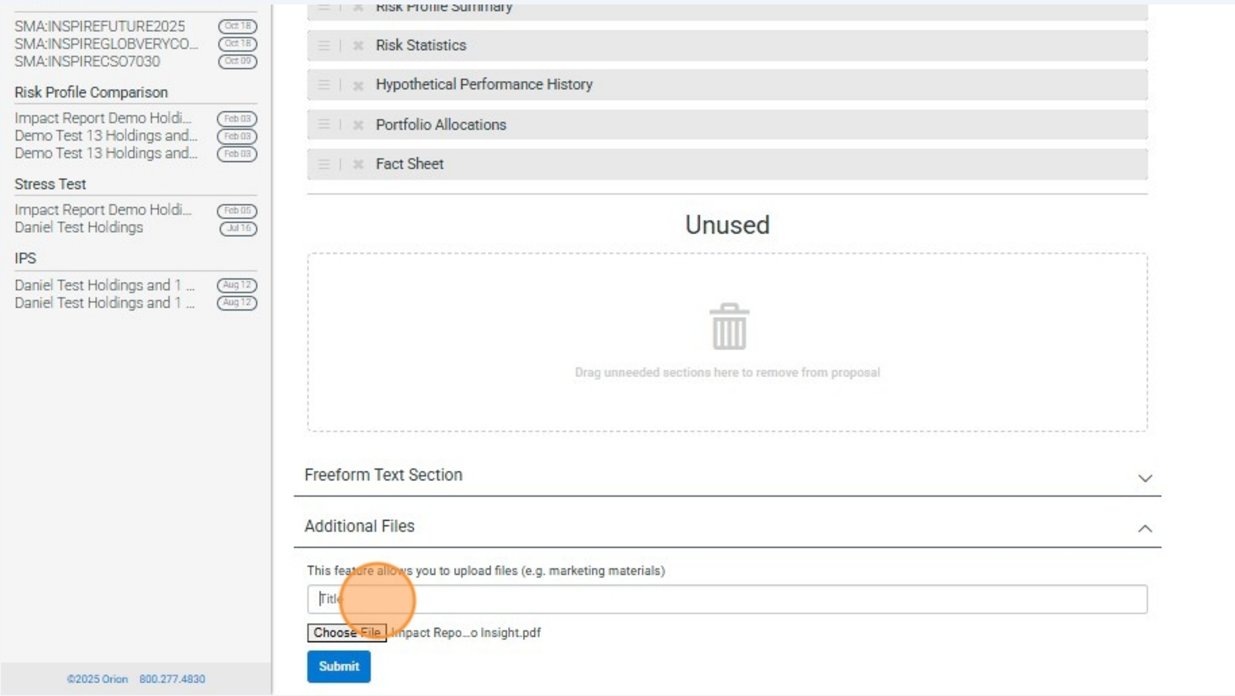
59 Select Choose FIle



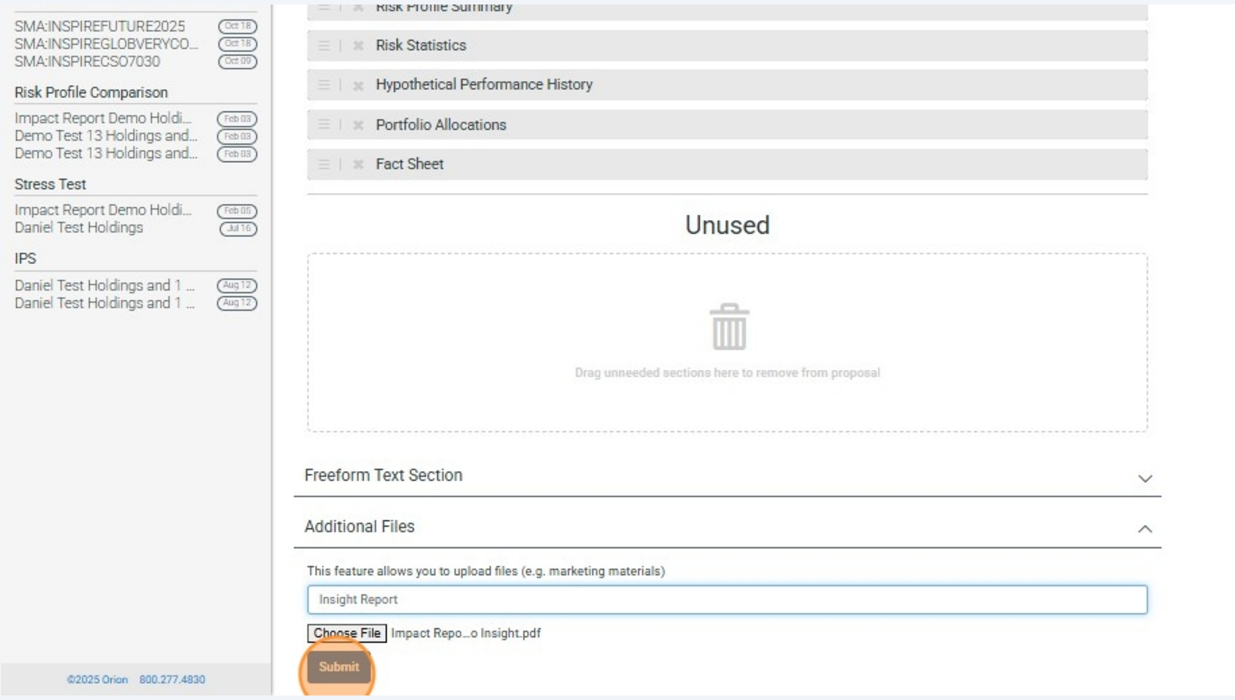
60 Navigate to the folder where you saved the Insight report, choose the file and click save.



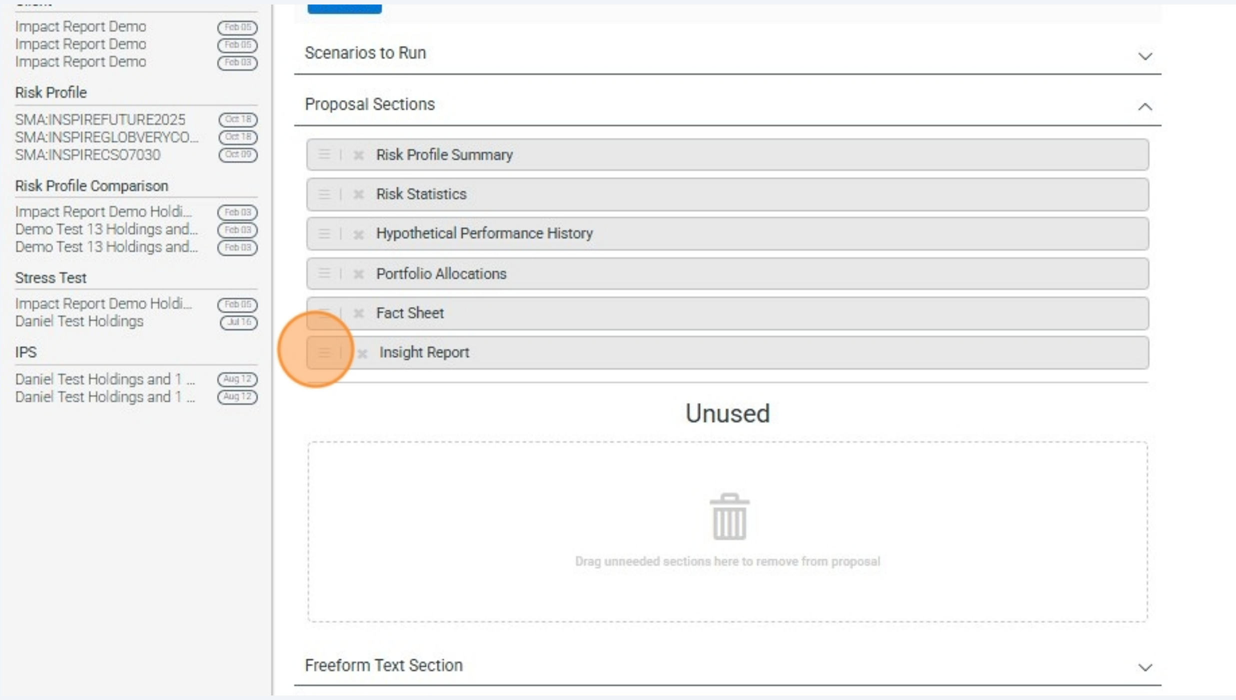
61 Click the "Title" field and enter "Insight Data"



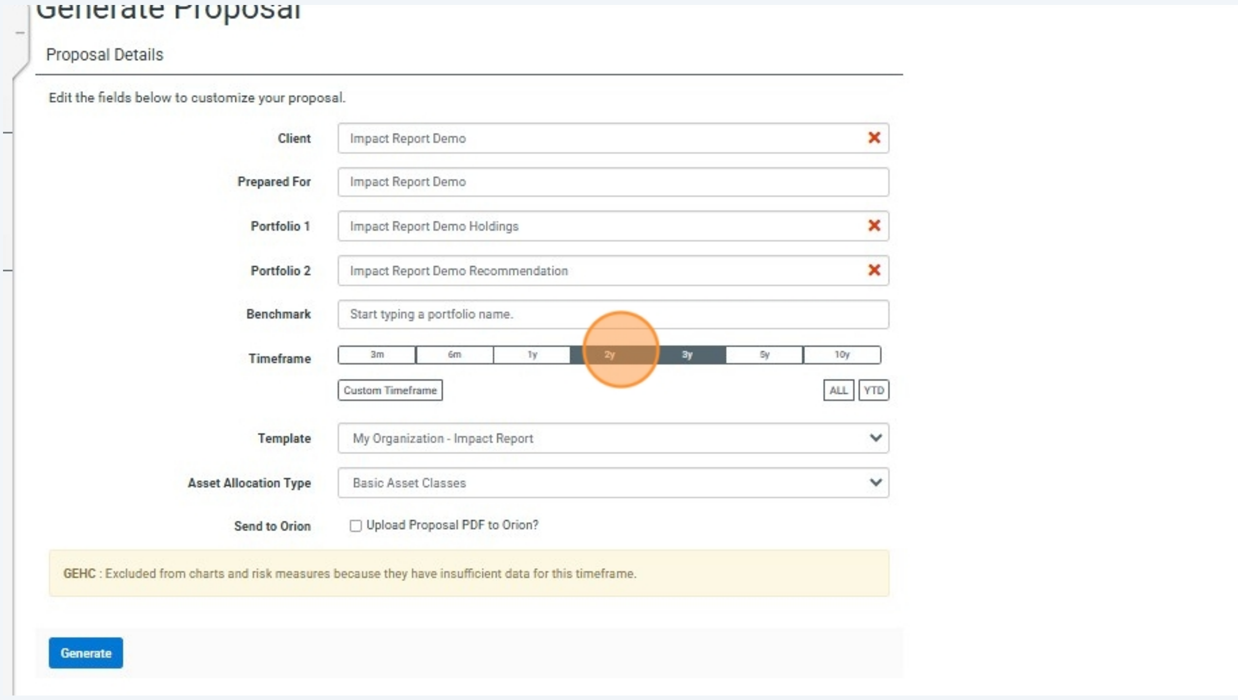
62 Click "Submit"



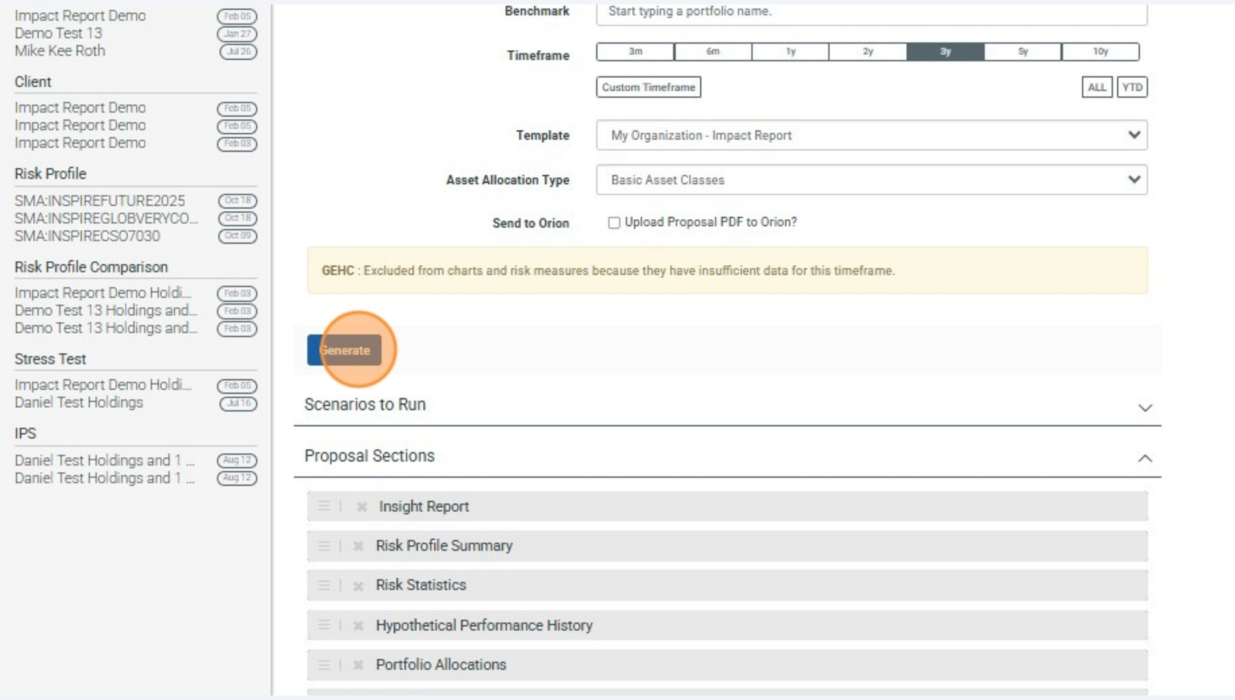
63 Navigate to the Proposal Section Drop Down. Click on the hamburger menu next to the Insight Report and drag to the top of the list of sections.



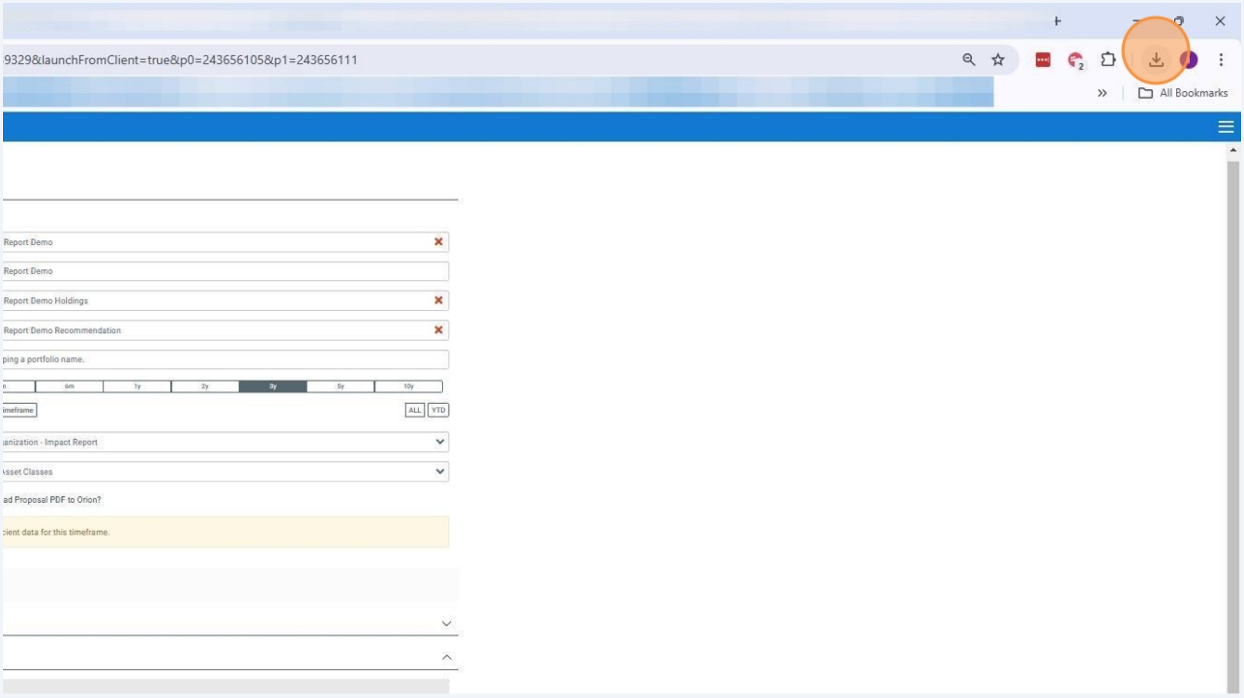
64 Adjust the time frame to your preference.



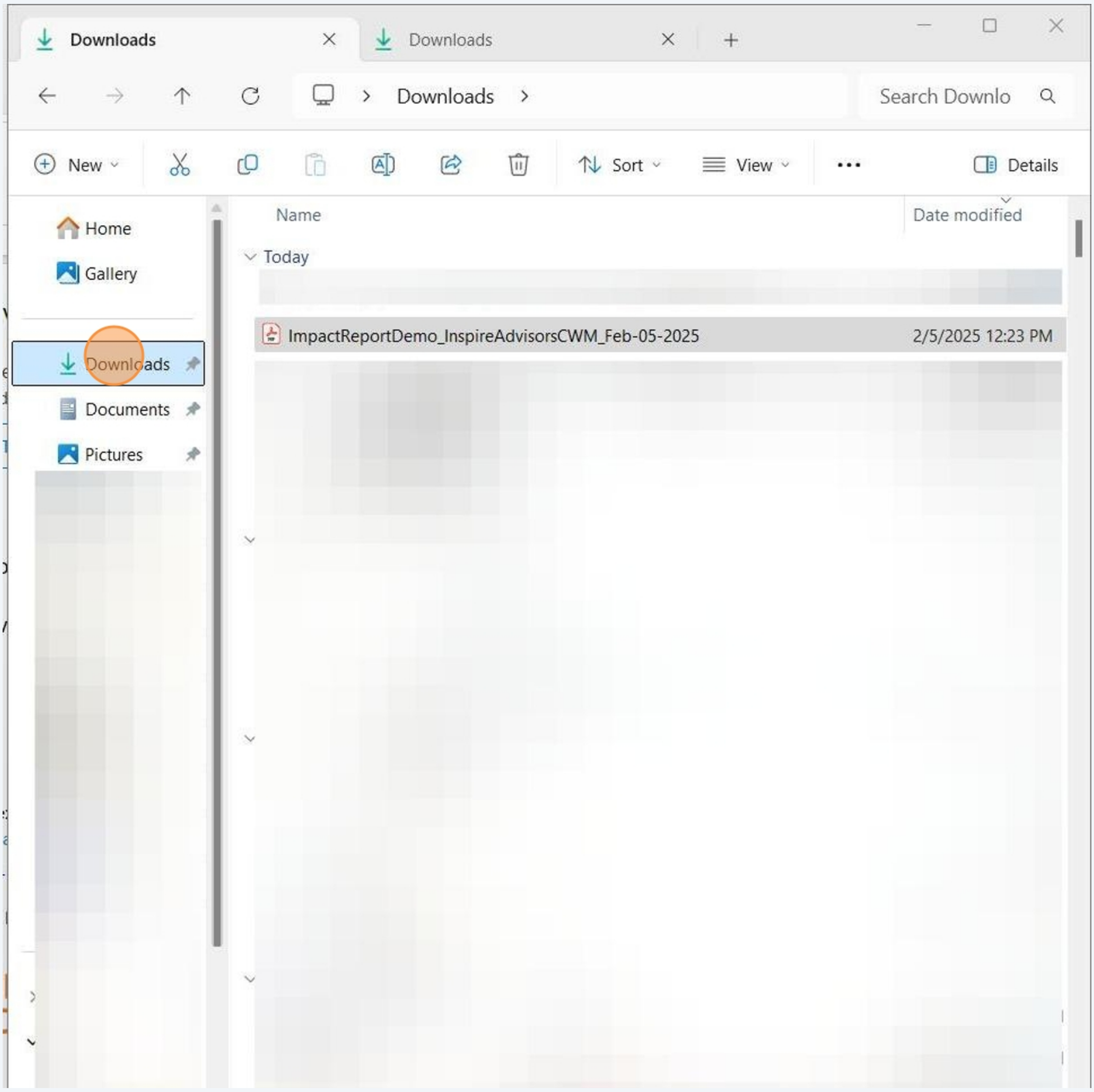
65 Click "Generate"



66 If you use Chrome, you can click the download icon and open the report



67 You will also be able to find the report in your file explorer. Usually in the downloads folder.



68 Click "AVPageView"