

Create An Impact Report Demo Using Hidden Levers



1 Navigate to <https://inspireinsight.com/>

2 Click "Dashboard"

The screenshot shows the Inspire Insight dashboard. At the top right, there is a "Dashboard" button. The main header features the Inspire Insight logo and a search bar with the placeholder text "Search by ticker, company, or fund name". Below the search bar, it states "Biblical values data on 47,302 tickers". The dashboard is divided into four columns: Funds, Trending Issue: Abortion Travel, Top Scoring US Stocks, and Worst Scoring US Stocks. Each column contains a list of items with their respective scores and icons.

Funds	Trending Issue: Abortion Travel	Top Scoring US Stocks	Worst Scoring US Stocks
Inspire 100 ETF (65)	4324 Dentsu Group Inc. (-72)	AOS A. O. Smith Corporation (91)	META Meta Platforms Inc. Class... (-100)
Inspire Global Hope ETF (59)	ACN Accenture Plc Class A (-72)	BC Brunswick Corporation (90)	PFE Pfizer Inc. (-100)
Inspire Fidelis Multi Fac... (55)	BBWI Bath & Body Works, Inc. (-72)	ARE Alexandria Real Estate Eq... (88)	GOOG Alphabet Inc - Class C (-100)
Inspire Momentum ETF (56)	DBK Deutsche Bank Aktiengesel... (-72)	BMI Badger Meter, Inc. (88)	JNJ Johnson & Johnson (-100)
Inspire Small/Mid Cap ETF (56)	DKS Dick's Sporting Goods, In... (-72)	CBT Cabot Corporation (87)	GOOGL Alphabet Inc. Class A (-100)
Inspire 500 ETF (53)	EL Estee Lauder Companies In... (-72)	NUS Nu Skin Enterprises, Inc.... (87)	MSFT Microsoft Corporation (-100)

3 Click "Portfolios"

ire SIGHT Search by ticker, company, or fund name Dashboard Portfolios R

Hi, Regina!

Welcome to your dashboard.

Current Plan: **Pro** Upgrade

Empire Funds

Northern Lights Fund...	64
Northern Lights Fund...	56
Northern Lights Fund...	56
Northern Lights Fund...	56
Northern Lights Fund...	55
Northern Lights Fund...	54
Northern Lights Fund...	40
Northern Lights Fund...	0

Trending Issue: Abortion Travel

TSLA	Tesla Inc	-53
KR	Kroger Co.	-53
WFC	Wells Fargo & Co.	-72
INTU	Intuit Inc	-72
ADBE	Adobe Inc	-72
NKE	Nike, Inc. - Ordinar...	-72
MSFT	Microsoft Corporatio...	-100
AAPL	Apple Inc	-100

4 Choose Create Portfolio

ire SIGHT Search by ticker, company, or fund name Dashboard Portfolios R

Portfolios

Portfolios Search Alphabetical Ascen... Grid Delete Selected + Create Portfolio

64

\$6,562,744 | 446 Holdings
id: 7/24/2024

27

IRA | \$474,846 | 10 Holdings
Last Modified: 7/26/2024

31

Roth IRA | \$98,574 | 8 Holdings
Last Modified: 7/26/2024

NA

new test
Individual | \$0 | 0 Holdings
Last Modified: 5/2/2024

47

069 | 70 Holdings
id: 4/22/2024

17

Screened Funds
Individual | \$14,100 | 71 Holdings
Last Modified: 2/3/2025

5 Enter the Client's Name

inspire
INSIGHT

Search by ticker, company, or fund name

Dashboard Portfolios

Portfolios

Search Portfolios

DELETE Selected + Create Portfolio

CREATE PORTFOLIO

Portfolio Name

Portfolio Type

Individual Joint IRA Roth IRA Trust

401(k) 403(b) 529 HSA Other

Cancel Create

6 Choose the account type

inspire
INSIGHT

Search by ticker, company, or fund name

Dashboard Portfolios

Portfolios

Search Portfolios

DELETE Selected + Create Portfolio

CREATE PORTFOLIO

Portfolio Name

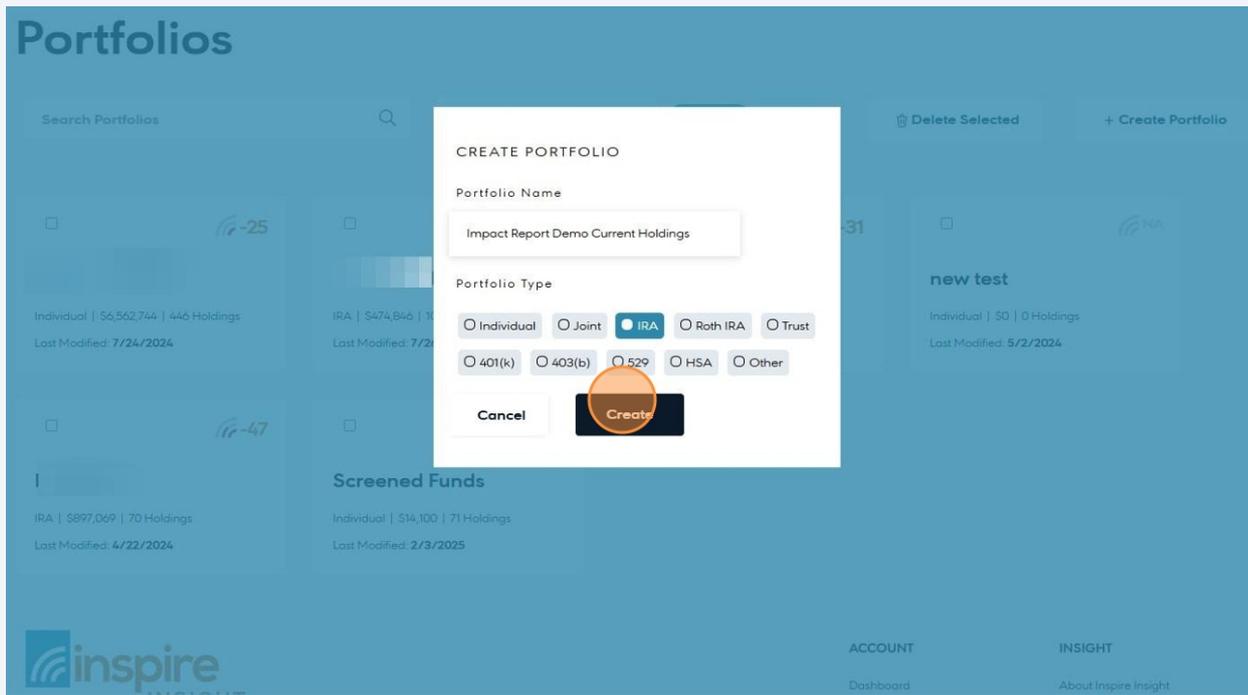
Portfolio Type

Individual Joint IRA Roth IRA Trust

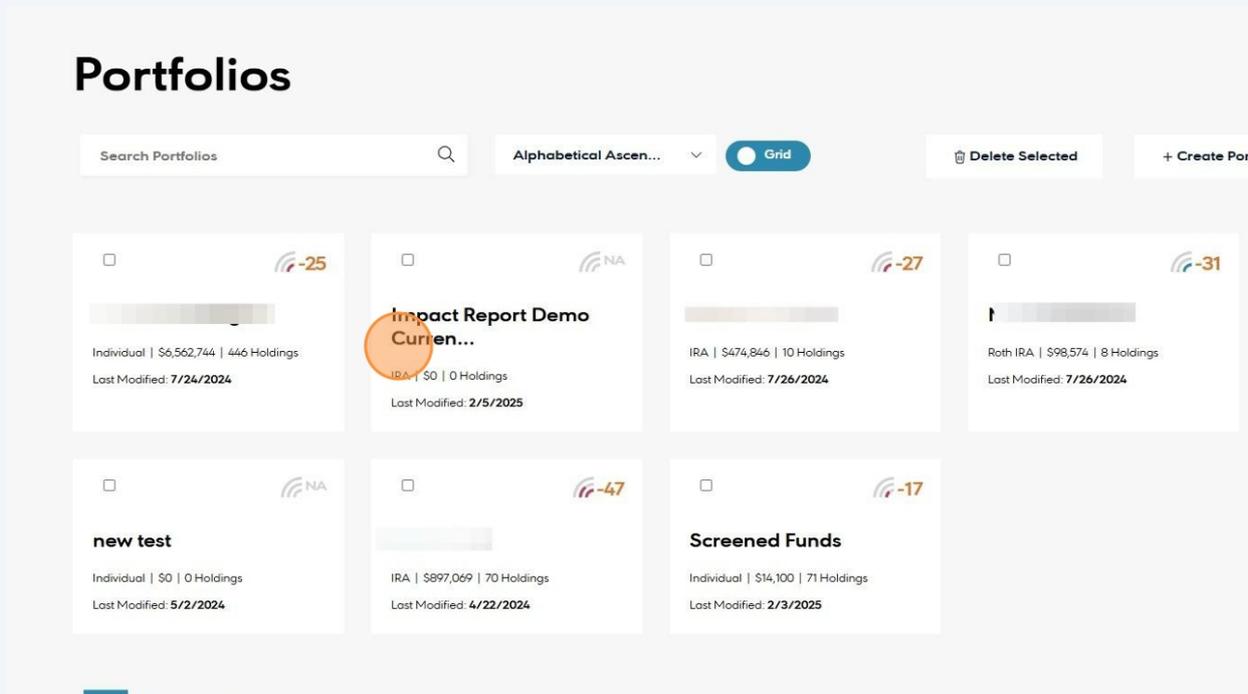
401(k) 403(b) 529 HSA Other

Cancel Create

7 Click "Create"



8 Click on the portfolio you just made



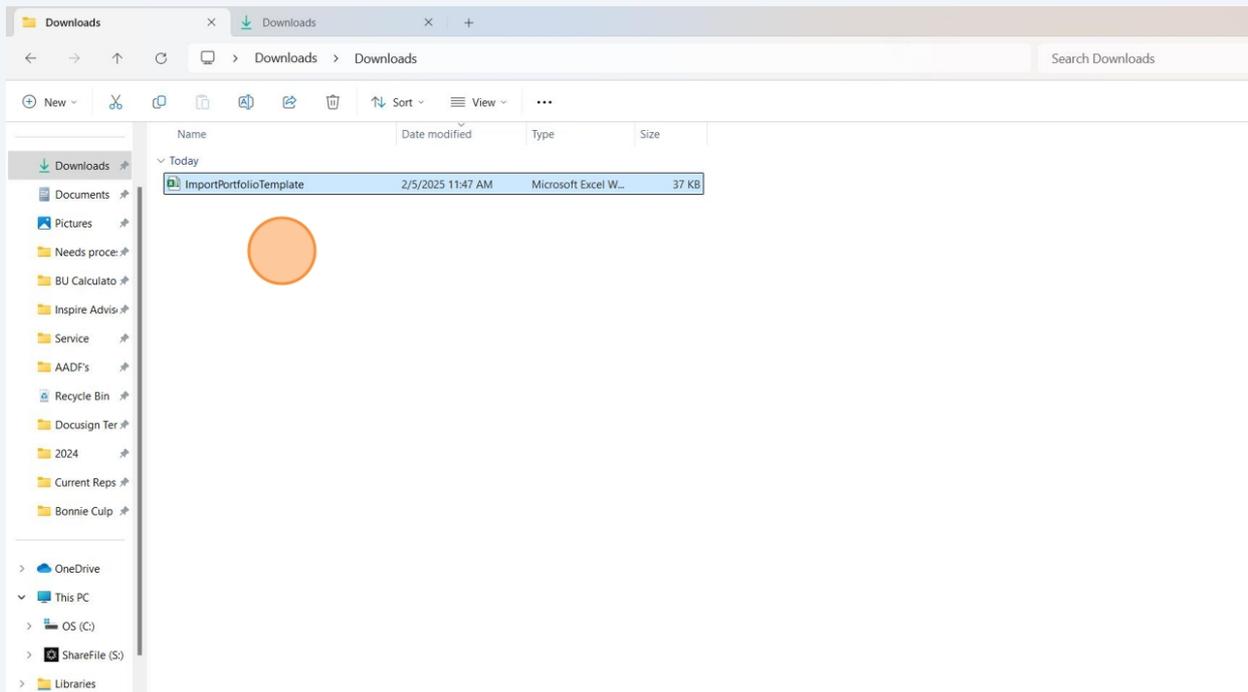
9 Click "Import"

The screenshot shows the Inspire Impact Insights dashboard. At the top left is the Inspire logo. A search bar contains the text "Search by ticker, company, or fund name". On the top right are links for "Dashboard" and "Portfolios". The main heading is "Impact Report Demo Current Holdings" with a sub-heading "IRA | \$0 | 0 Holding | Last Modified: 2/5/2025". Below this is a row of action buttons: "Report", "Import" (highlighted with an orange circle), "Export", "Compare", "Portfolio Settings", and "Delete". Underneath is a "Screening Profile: Faith Based Evangelical" with a "Change" button. Two panels labeled "POSITIVE" and "NEGATIVE" both show "No Categories" with a sub-note "There are no known categories to report." and a trash icon. At the bottom is a banner image with the "give50" logo and the text "Inspire's Giving Pledge".

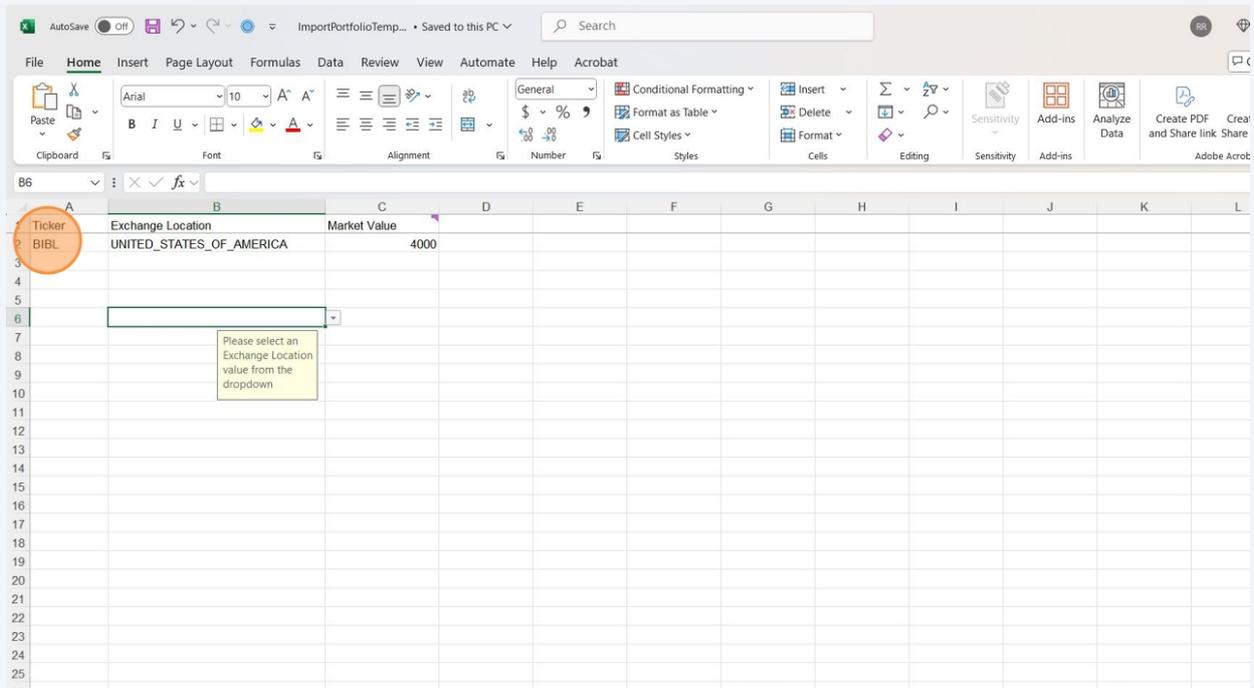
10 Download the template

This screenshot shows the same dashboard as above, but with a modal dialog box open in the center. The dialog has a close button (X) in the top right corner. Inside the dialog, there is a dashed blue box containing the text "Drag and drop Excel File here, or click here to import". Below this box, it says "To import your holdings use the Inspire Holdings Excel Template." and features a "Download Template" button (highlighted with an orange circle) and a "Cancel" button.

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

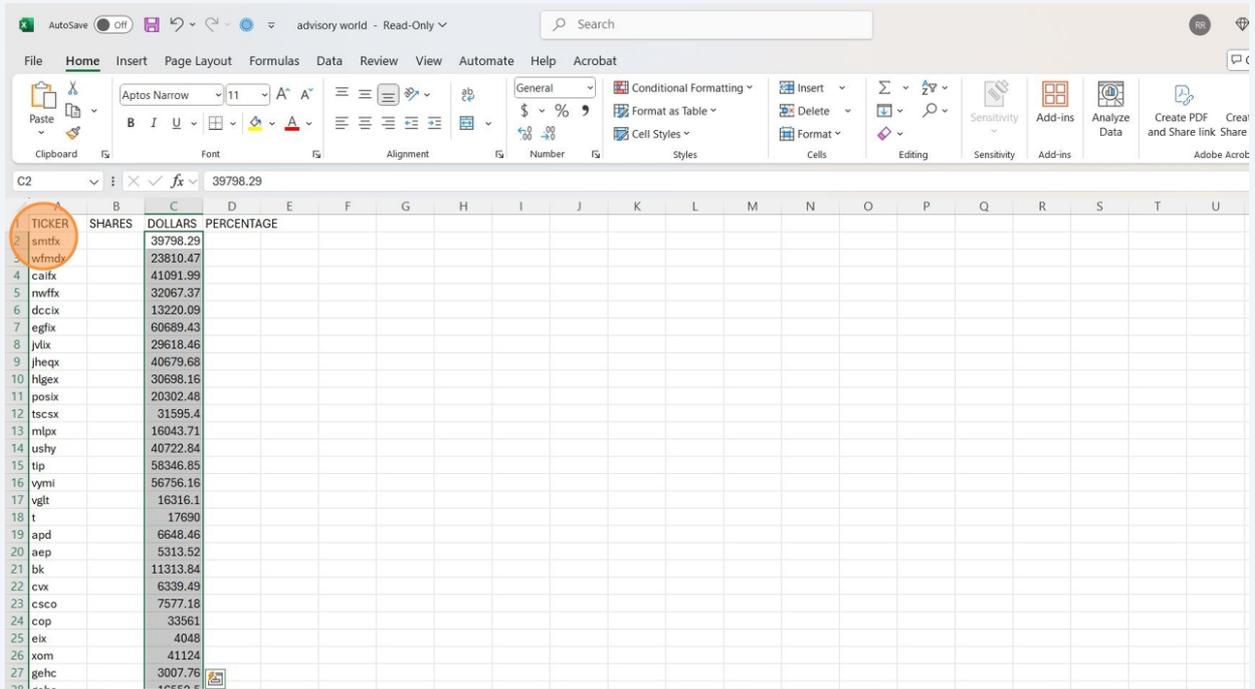


12 Click the yellow ribbon at the top to begin editing. Remove the example holdings.



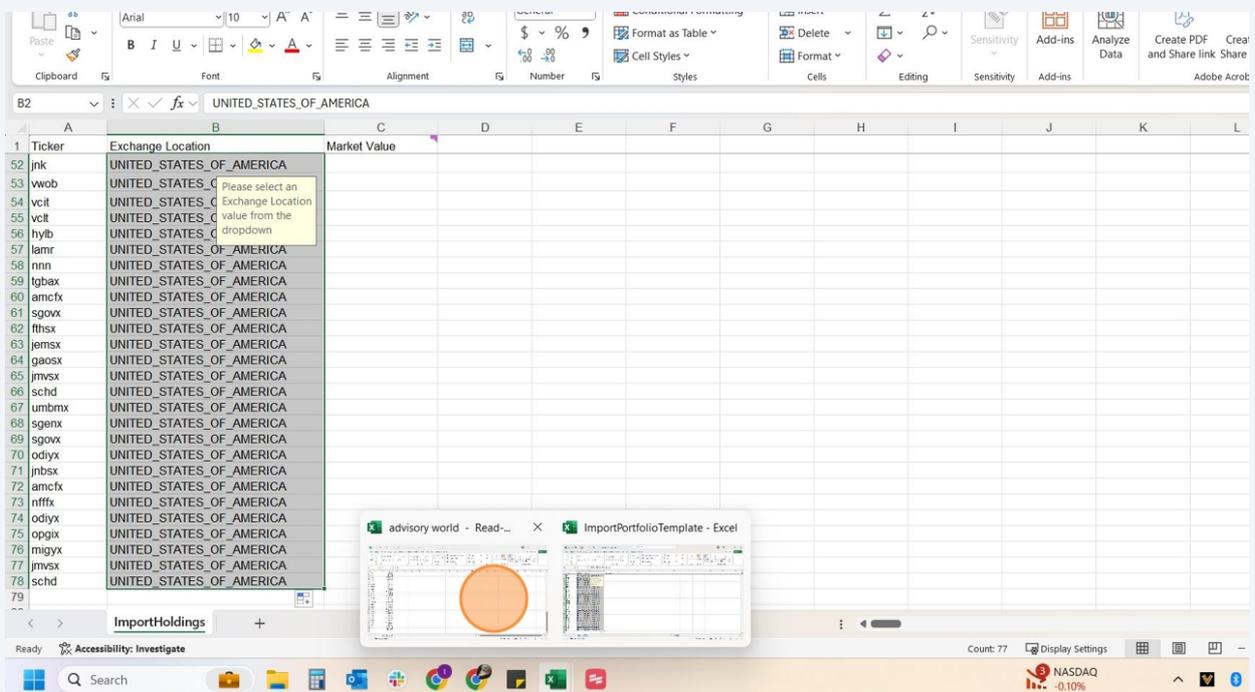
13

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"

The screenshot shows the Microsoft Excel interface with the 'Home' ribbon selected. The 'Save' button, represented by a floppy disk icon, is circled in orange in the top-left corner of the ribbon. The spreadsheet below contains a table with columns for Ticker, Exchange Location, and Market Value.

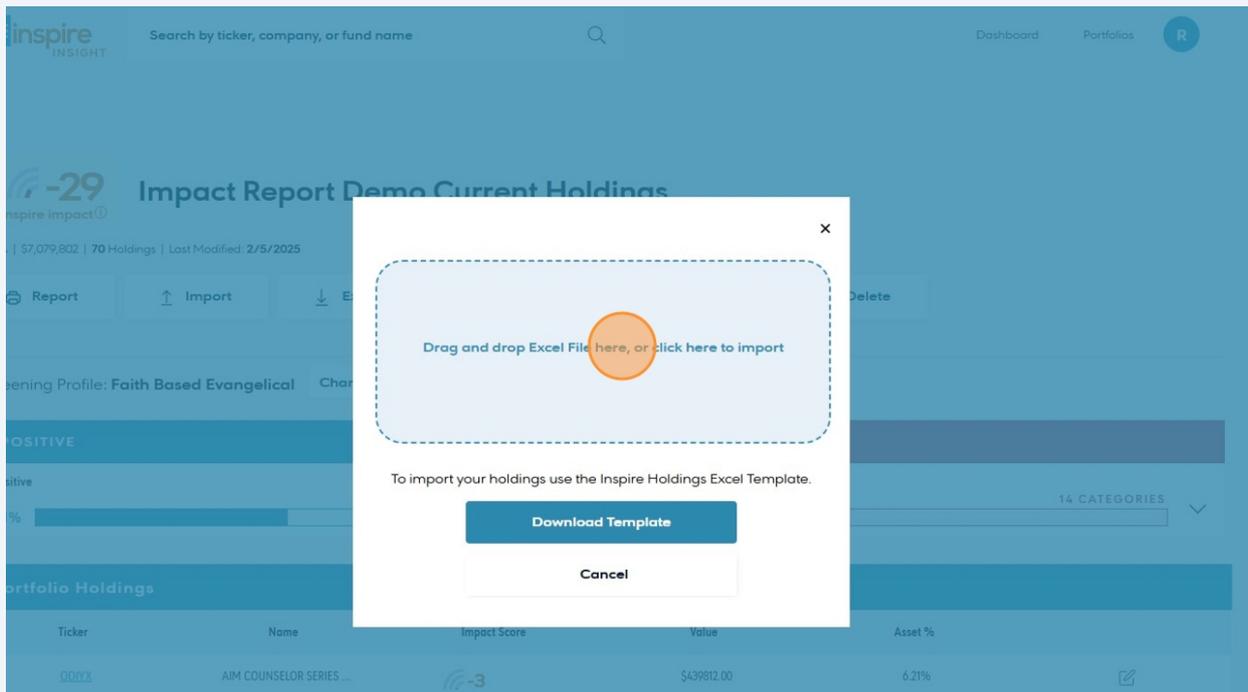
1	Ticker	Exchange Location	Market Value
2	smftx	UNITED_STATES_OF_AMERICA	39798.29
3	wfmdx	UNITED_STATES_OF_AMERICA	23810.47
4	caifx	UNITED_STATES_OF_AMERICA	41091.99
5	nwffx	UNITED_STATES_OF_AMERICA	32067.37
6	dccix	UNITED_STATES_OF_AMERICA	13220.09
7	egfix	UNITED_STATES_OF_AMERICA	60689.43
8	ylmix	UNITED_STATES_OF_AMERICA	29618.46
9	jheqx	UNITED_STATES_OF_AMERICA	40679.68
10	hlhex	UNITED_STATES_OF_AMERICA	30698.16
11	posix	UNITED_STATES_OF_AMERICA	20302.48
12	tsctx	UNITED_STATES_OF_AMERICA	31595.4
13	mlpx	UNITED_STATES_OF_AMERICA	16043.71
14	ushy	UNITED_STATES_OF_AMERICA	40722.84
15	tip	UNITED_STATES_OF_AMERICA	58346.85
16	vymj	UNITED_STATES_OF_AMERICA	56756.16
17	vqll	UNITED_STATES_OF_AMERICA	16316.1
18	t	UNITED_STATES_OF_AMERICA	17690
19	apd	UNITED_STATES_OF_AMERICA	6648.46
20	aep	UNITED_STATES_OF_AMERICA	5313.52
21	bk	UNITED_STATES_OF_AMERICA	11313.84
22	cvx	UNITED_STATES_OF_AMERICA	6339.49
23	cscx	UNITED_STATES_OF_AMERICA	7577.18
24	cop	UNITED_STATES_OF_AMERICA	33561
25	eix	UNITED_STATES_OF_AMERICA	4048

16 Click "Close"

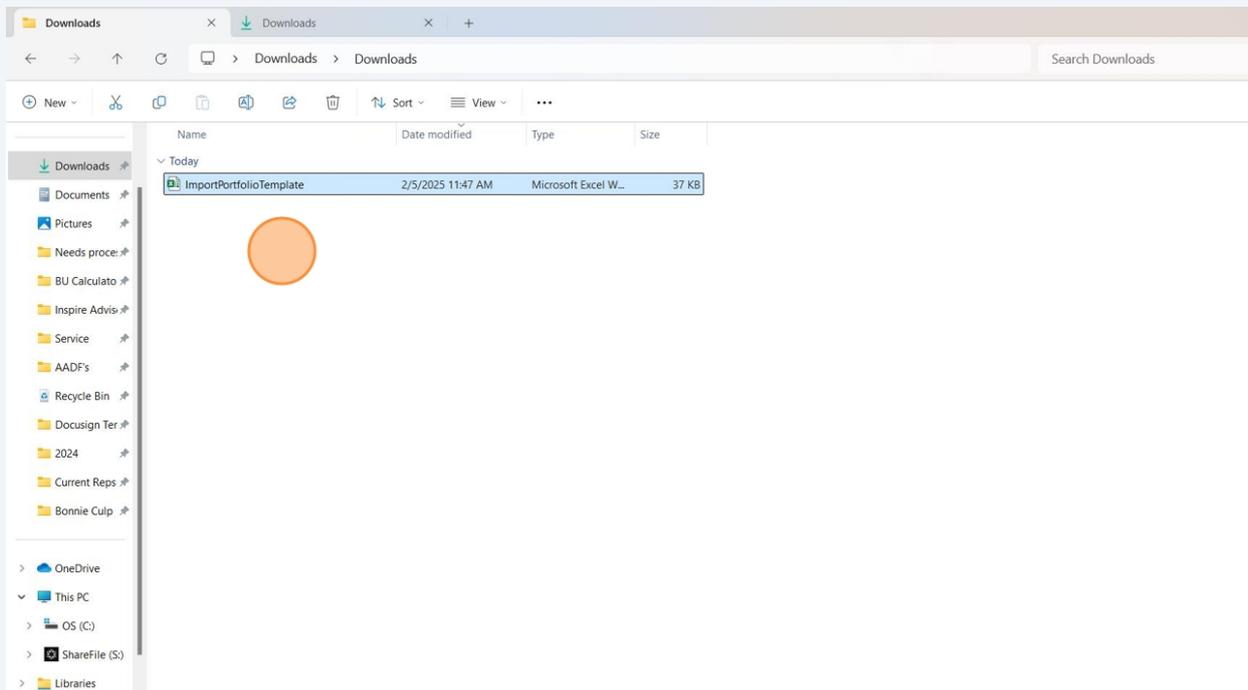
The screenshot shows the Microsoft Excel window with the 'Close' button, represented by an 'X' icon, circled in orange in the top-right corner of the window title bar. The spreadsheet content is partially visible, showing the same data as in the previous screenshot.

Exchange Location	Market Value
UNITED_STATES_OF_AMERICA	39798.29
UNITED_STATES_OF_AMERICA	23810.47
UNITED_STATES_OF_AMERICA	41091.99
UNITED_STATES_OF_AMERICA	32067.37
UNITED_STATES_OF_AMERICA	13220.09
UNITED_STATES_OF_AMERICA	60689.43
UNITED_STATES_OF_AMERICA	29618.46
UNITED_STATES_OF_AMERICA	40679.68
UNITED_STATES_OF_AMERICA	30698.16
UNITED_STATES_OF_AMERICA	20302.48
UNITED_STATES_OF_AMERICA	31595.4
UNITED_STATES_OF_AMERICA	16043.71
UNITED_STATES_OF_AMERICA	40722.84
UNITED_STATES_OF_AMERICA	58346.85
UNITED_STATES_OF_AMERICA	56756.16
UNITED_STATES_OF_AMERICA	16316.1
UNITED_STATES_OF_AMERICA	17690
UNITED_STATES_OF_AMERICA	6648.46
UNITED_STATES_OF_AMERICA	5313.52
UNITED_STATES_OF_AMERICA	11313.84
UNITED_STATES_OF_AMERICA	6339.49
UNITED_STATES_OF_AMERICA	7577.18
UNITED_STATES_OF_AMERICA	33561
UNITED_STATES_OF_AMERICA	4048

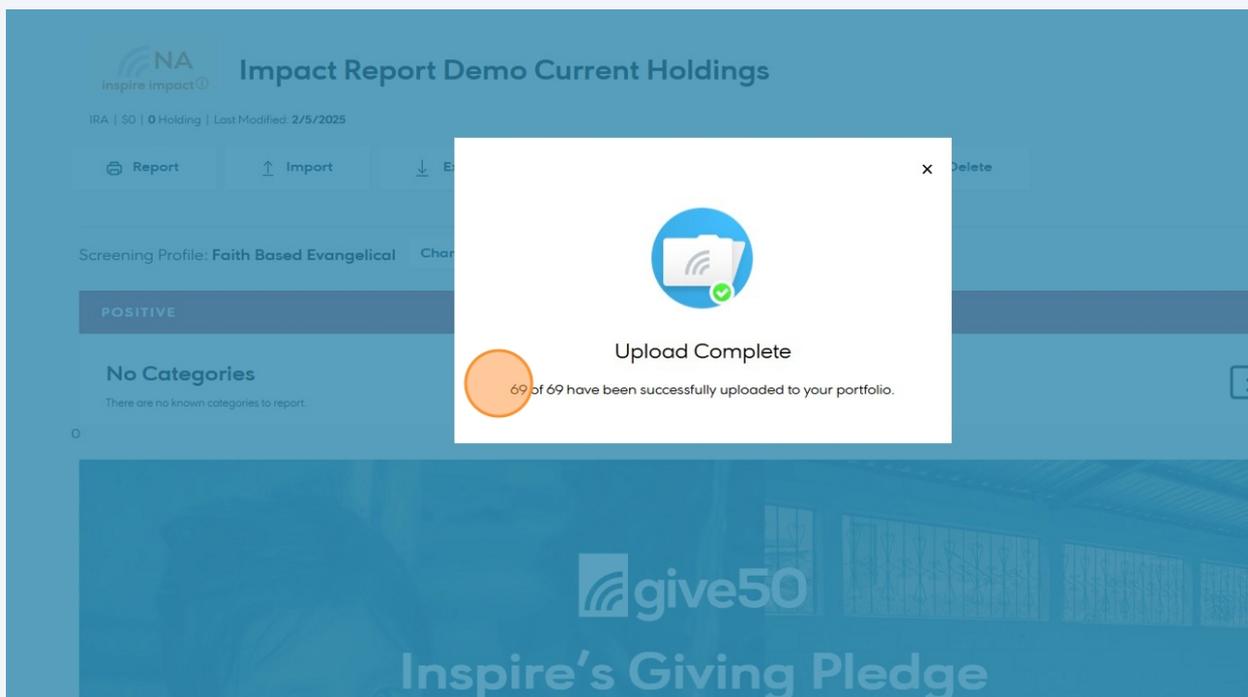
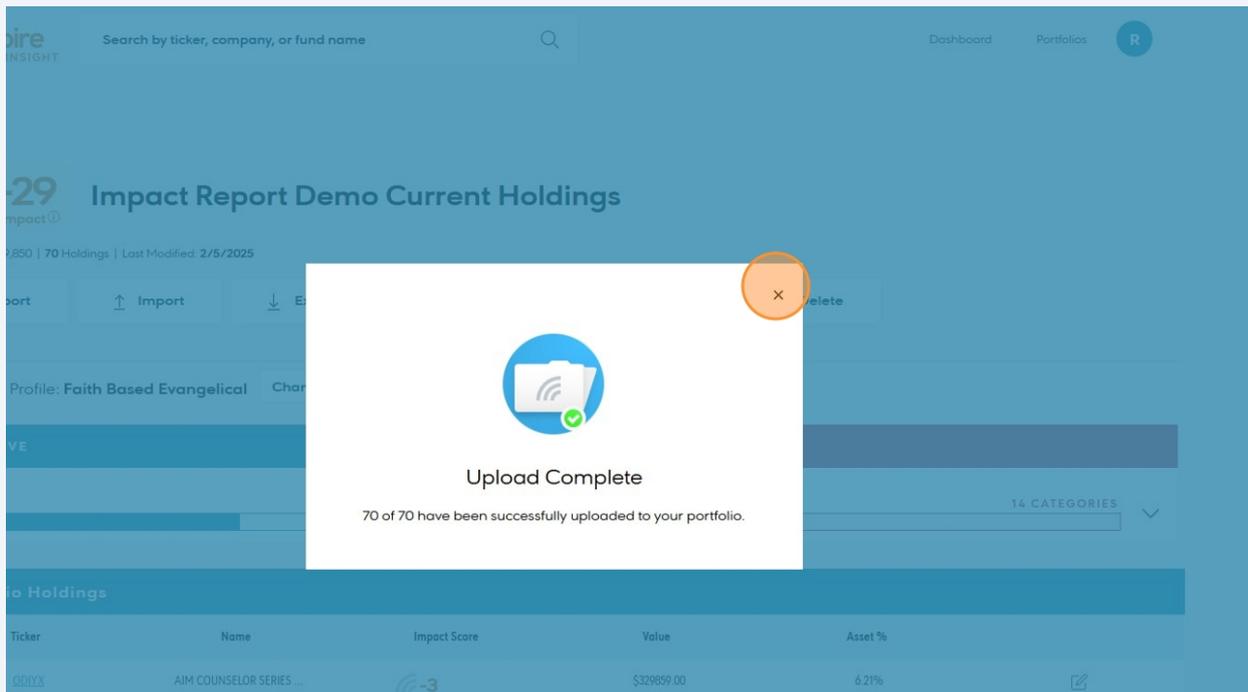
17 Navigate back to Inspire Insight in your browser



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)



Impact Report Demo Current Holdings

IRA | \$1,769,950 | 69 Holdings | Last Modified: 2/5/2025

- Report
- Import
- Export
- Compare
- Portfolio Settings
- Delete

Screening Profile: Faith Based Evangelical [Change](#)



Ticker	Name	Impact Score	Value	Asset %
ODIYX	AIM COUNSELOR SERIES ...	-3	\$109953.00	6.21%
SGENX	FIRST EAGLE FUNDS - ...	-23	\$91103.10	5.15%
JMVSX	JP MORGAN FLEMING MU ...	-21	\$81197.40	4.59%
AMCFX	AMCAP FUND - AMCAP F ...	-44	\$77648.70	4.39%

21

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



Impact Report Demo Current Holdings

IRA | \$1,769,950 | 69 Holdings | Last Modified: 2/5/2025

- Report
- Import
- Export
- Compare
- Portfolio Settings
- Delete

Screening Profile: Faith Based Evangelical [Change](#)



Health and Safety (Best In Class)	54 SECURITIES
Management (Best In Class)	51 SECURITIES
Issues (Best In Class)	52 SECURITIES
Chain Management (Best In Class)	51 SECURITIES

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

Inspire's Giving Pledge

Inspire believes that good returns and good values are not mutually exclusive. Not only does Inspire invest in some of the most impactful companies in the world, but they also seek to be one of the most impactful companies in the world. One way Inspire works to make a meaningful impact in the world is through generosity. **Inspire donates at least 50% of the net profits from their management fees to impactful charities with our Give50 campaign.**

[Learn More About Inspire →](#)

Discover the impact your investment portfolio can make over **20 years** by investing with Inspire

Potential impact of a \$1769950.1 portfolio with 7% expected annual rate of return

Icon	Value	Description
Water tap	1,388	People provided with a clean water source
Bible	4,163	Bibles given to the persecuted Church
Shoebox	833	Operation shoebox gifts delivered
Person	4,774	People reached for the gospel
Court gavel	198	Cases of legal representation for the oppressed
Heart	5,204	Potential babies spared through pro-life counsel

23 Click "Report"

inspire INSIGHT Search by ticker, company, or fund name Dashboard Portfolios

-29 inspire impact

IRA | \$1,769,950 | 69 Holdings | Last Modified: 2/5/2025

Report Import Export Compare Portfolio Settings Delete

Screening Profile: Faith Based Evangelical Change

POSITIVE	NEGATIVE
Positive 51% 26 CATEGORIES	Negative 26% 14 CATEGORIES
Employee Health and Safety (Best In Class) 51% 54 SECURITIES	LGBT Promotion 26% 44 SEC
Energy Management (Best In Class) 50% 51 SECURITIES	Abortion Promotion 14% 34 SEC

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

The screenshot shows the 'Impact Report Demo Current Holdings' interface. On the right, a settings panel is open with the following options:

- Destination: Save as PDF
- Pages: All
- Layout: Portrait
- More settings: (dropdown arrow)

At the bottom of the settings panel are 'Save' and 'Cancel' buttons. Orange arrows point to the 'Save as PDF', 'Portrait', and 'More settings' options.

The main report content is divided into two columns:

- POSITIVE** (26 CATEGORIES): 51% total. Categories include Employee Health and Safety (51%), Energy Management (50%), GHG Emissions (49%), Supply Chain Management (48%), Product Design and Lifecycle (45%), Employee Engagement Diversity (44%), Management of the Legal and (36%), Customer Welfare (35%), Waste and Hazardous Materials (35%), Materials Sourcing and Efficiency (32%), Access and Affordability (30%), Ecological Impacts (29%), Business Model Resilience (27%), Customer Privacy (24%), and Critical Incident Risk Management (21%).
- NEGATIVE** (14 CATEGORIES): 26% total. Categories include LGBT Promotion (26%), Abortion Promotion (14%), Pornography (5%), Exploitation (3%), Embryonic Stem Cells (1%), Abortifacients (1%), In Vitro Fertilization (<1%), Tobacco (<1%), Gambling (<1%), Alcohol (<1%), Cannabis: Pharmaceutical (<1%), Cannabis: Retail THC (<1%), Cannabis: Cultivation/Processing (<1%), and State Owned Enterprise (SOE) (<1%).

25 Save this somewhere you will be able to find it

The screenshot shows a 'Save As' dialog box open over a web browser. The dialog box is set to save the file in the 'Downloads > Needs processing' folder. The file name is 'Impact Report Demo Insight' and the save type is 'Adobe Acrobat Document'. The 'Save' button is circled in orange.

The background shows a web browser window with a settings panel on the right, similar to the one in step 24, with options for Print, Destination, Pages, Layout, and More settings.

26 Navigate to <https://www.hiddenlevers.com/>

27 Click "Add Client"

The screenshot displays the Orion Risk Intelligence Dashboard. At the top, the title "Orion Risk Intelligence Dashboard" is centered. Below the title are four main navigation cards: "Create Client", "Stress Test", "Risk Profile", and "Proposals". Each card has an icon and a brief description. The "Create Client" card is highlighted with a blue border. Below the cards, there are two sections: "Clients" and "Models / Portfolios". The "Clients" section has a search bar, a "Show All Clients" dropdown, and a table with columns for Name, Source, and Last Modified. The "Models / Portfolios" section has a search bar, a "Show All" dropdown, and a table with columns for Name, Source, and Type. An orange circle highlights the "Add Client" button in the top right corner of the "Clients" section.

Orion Risk Intelligence Dashboard

Create Client
Create a client with the client workflow. Send a Risk Tolerance Questionnaire and manage holdings and recommendations.

Stress Test
How does your clients portfolio perform if the market corrects, repeats 08-09, or sees interest rates spike?

Risk Profile
See stress test results, portfolio expected return, and traditional risk stats as part of a detailed risk overview.

Proposals
Create amazing white-label prospects under recommendations.

Clients

▼ Show All Clients ▼

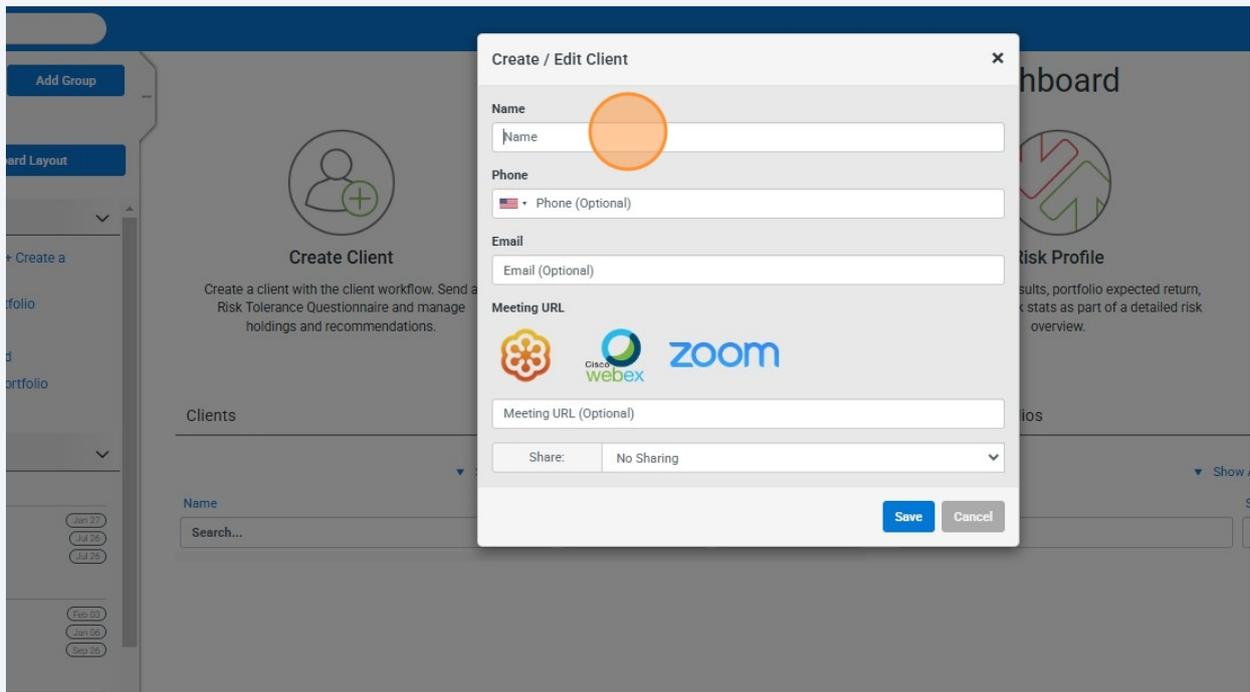
Name	Source	Last Modified
<input type="text" value="Search..."/>	All ▼	All ▼

Models / Portfolios

▼ Show All ▼

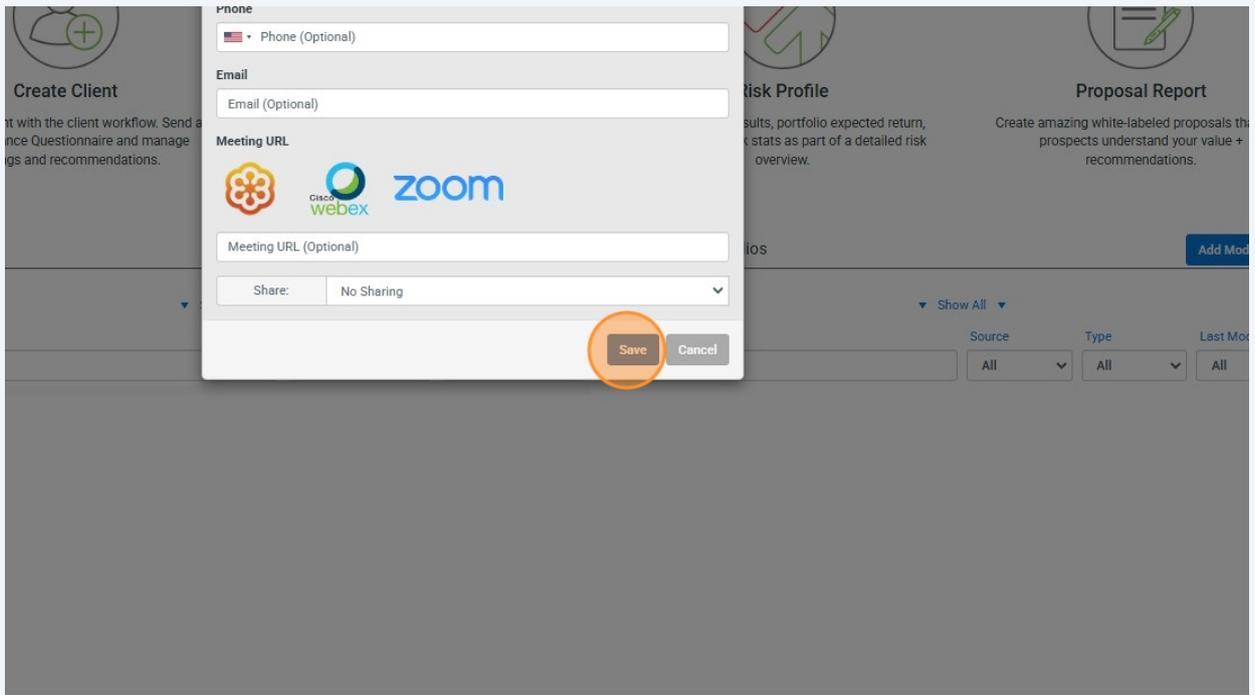
Name	Source	Type
<input type="text" value="Search..."/>	All ▼	All

28 Click the "Name" field.

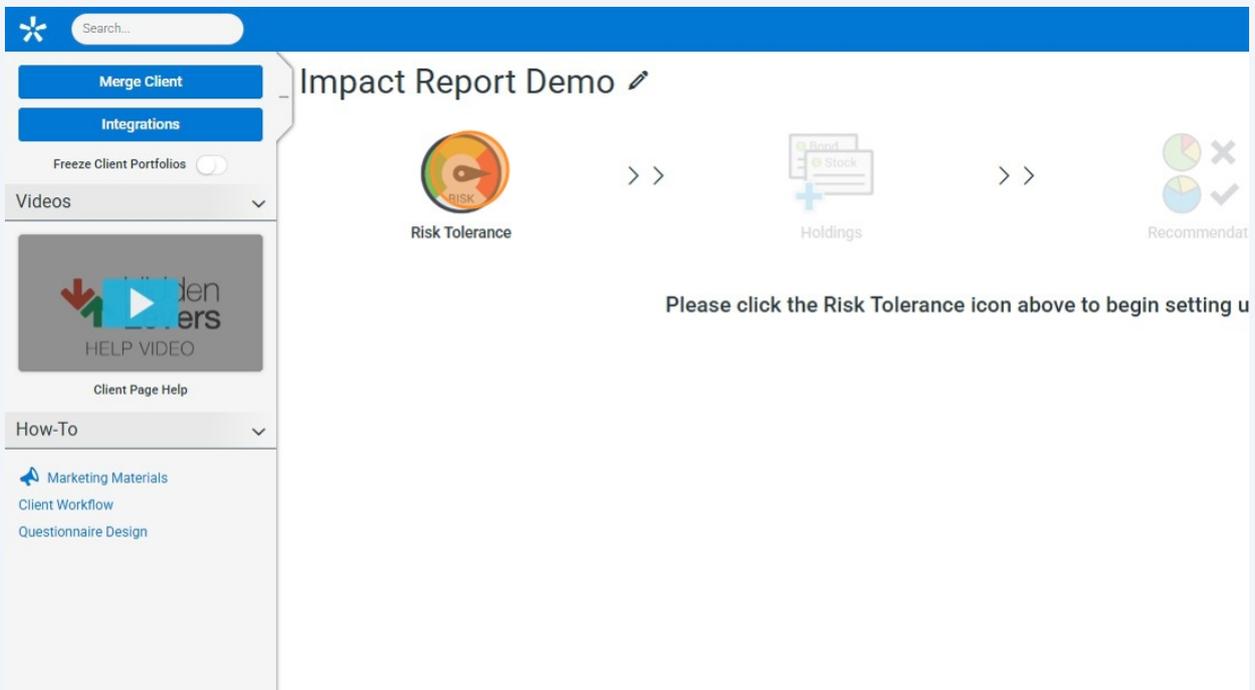


29 Type your client's name

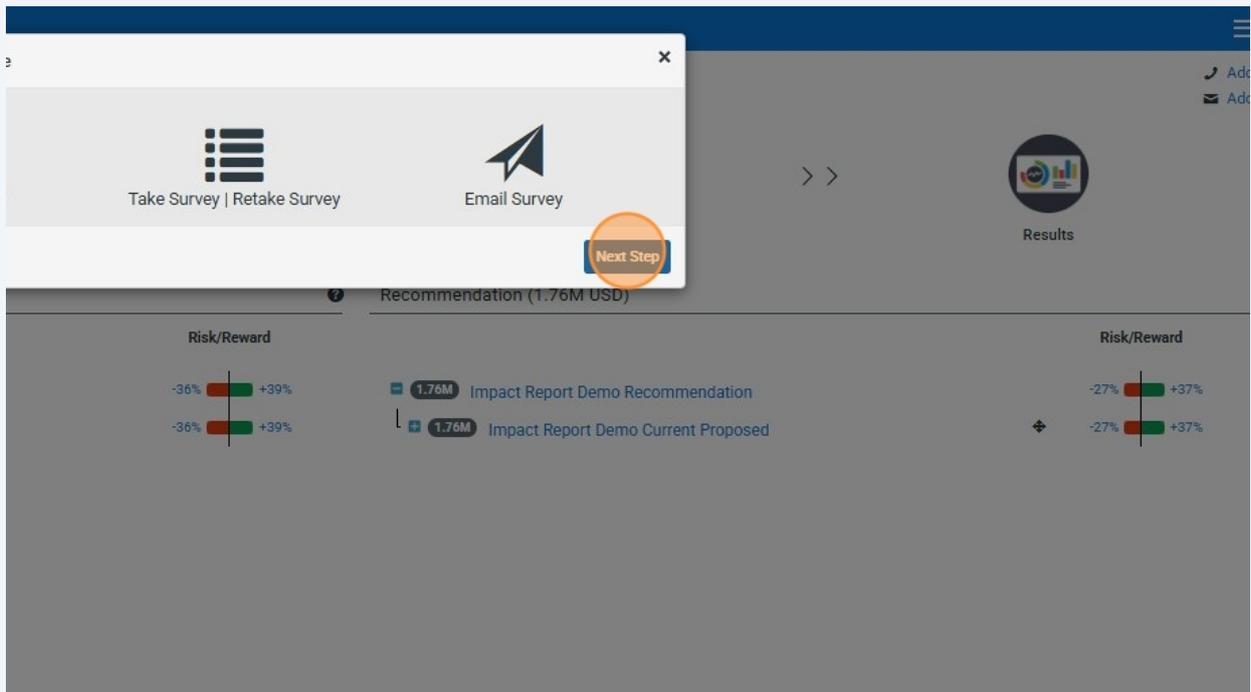
30 Click "Save"



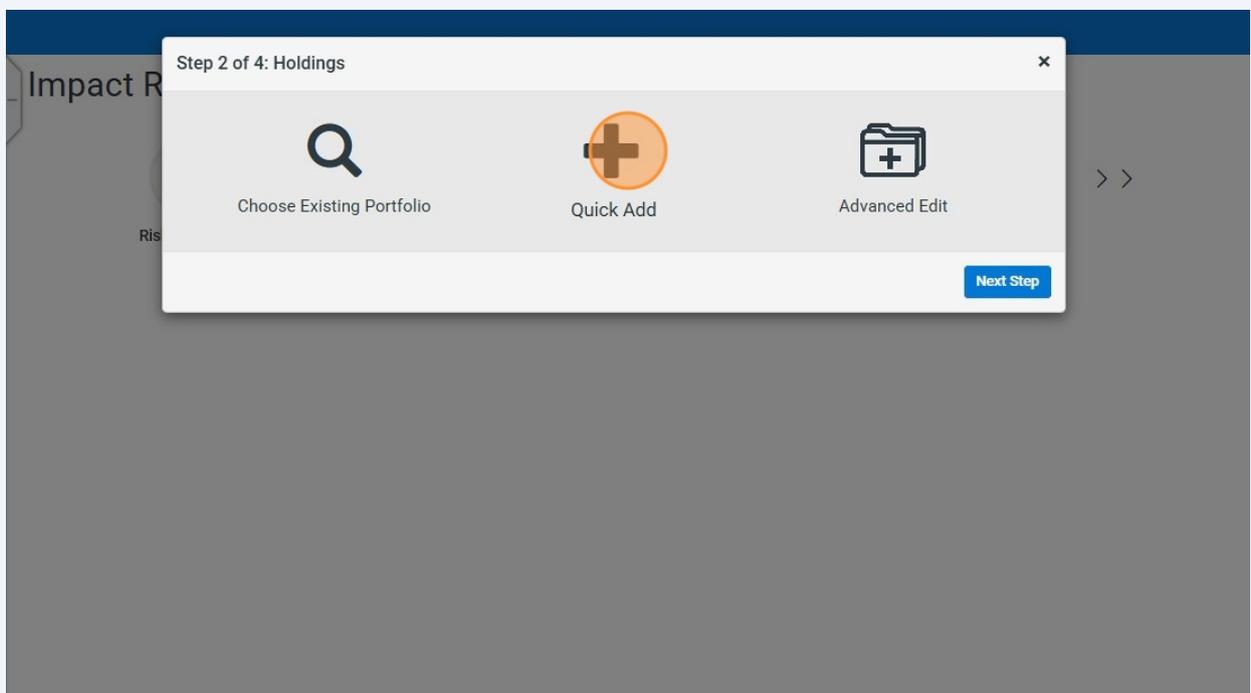
31 Click Risk Tolerance and enter manually or skip then click next step



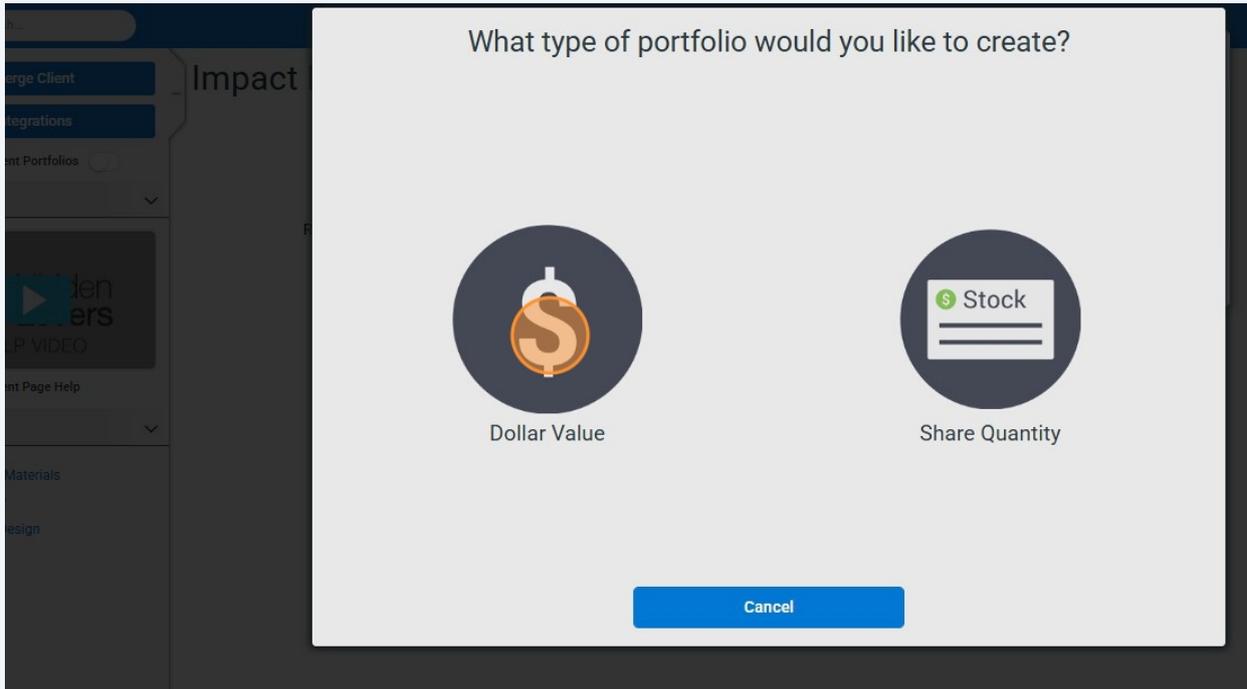
32 Enter the client's Risk Manually, or Skip by clicking next step.



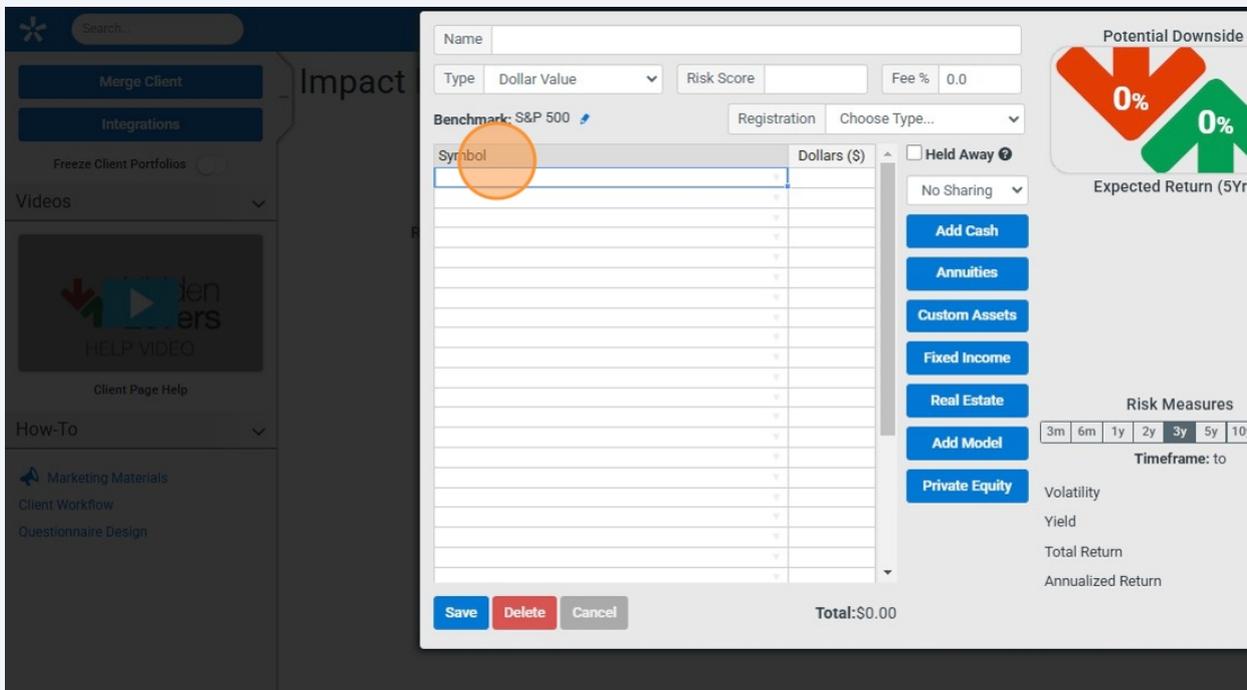
33 Click Quick Add



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.

The screenshot displays a financial management interface. On the left is a sidebar with navigation options: Merge Client, Integrations, Freeze Client Portfolios, Videos, Client Page Help, and How-To. The main area shows a portfolio named 'Impact' with a 'Name' field highlighted by an orange circle. Below the name field are controls for Type (Dollar Value), Risk Score, and Fee % (0.0). A table lists fund holdings with columns for Symbol and Dollars (\$). The total value is \$1,758,320.88. On the right, a summary panel shows a Potential Downside of -\$6, Expected Return (5Yr) of +\$, and a 78% Equities allocation. Risk Measures are also displayed for a 3-year timeframe.

Symbol	Dollars (\$)
SMTFX (Sit Minnesota Tax-Free Income Fund)	39,924.63
WFMDX (Allspring Special Mid Cap Value Fund - Class Admin)	23,790.78
CAIFX (American Funds Capital Income Builder Class F-2)	41,034.13
NWFFX (American Funds New World Fund Class F-1)	31,784.13
DCCIX (Delaware Small Cap Core Fund Institutional Class)	13,170.20
EGFIX (Edgewood Growth Fund Class Institutional)	59,703.57
JVLIX (John Hancock Funds Disciplined Value Fund Class I)	29,481.22
JHEQX (JPMorgan Hedged Equity Fund Class I)	40,342.59
HLGEX (JPMorgan Mid Cap Growth Fund Class I)	30,474.50
POSIX (Principal Global Real Estate Securities Fund Institutional Class)	20,280.56
TSCSX (Thrivent Small Cap Stock Fund Class S)	30,953.10
MLPX (Global X MLP Energy Infrastructure ETF)	15,279.84
USHY (iShares Broad USD High Yield Corporate Bond ETF)	63,565.58
TIP (iShares TIPS Bond ETF)	58,661.86

37 Name "Client's Name Current Holdings"

38 Click "Save"

The screenshot shows a financial planning software interface. On the left is a sidebar with navigation options like 'Marketing Materials', 'Client Workflow', and 'Questionnaire Design'. The main area features a table of fund selections. A red circle highlights the 'Save' button at the bottom of the table. To the right, there's a summary panel with asset allocation buttons (Annuities, Custom Assets, Fixed Income, Real Estate, Add Model, Private Equity) and a circular gauge showing '78% Equities'. Below the gauge are 'Risk Measures' and a 'Timeframe' selector.

Fund Name	Value
NWFFX (American Funds New World Fund Class F-1)	31,784.13
DCCIX (Delaware Small Cap Core Fund Institutional Class)	13,170.20
EGFIX (Edgewood Growth Fund Class Institutional)	59,703.57
JVLIX (John Hancock Funds Disciplined Value Fund Class I)	29,481.22
JHEQX (JPMorgan Hedged Equity Fund Class I)	40,342.59
HLGEX (JPMorgan Mid Cap Growth Fund Class I)	30,474.50
POSIX (Principal Global Real Estate Securities Fund Institutional Class)	20,280.56
TSCSX (Thrivent Small Cap Stock Fund Class S)	30,953.10
MLPX (Global X MLP Energy Infrastructure ETF)	15,279.84
USHY (iShares Broad USD High Yield Corporate Bond ETF)	63,565.58
TIP (iShares TIPS Bond ETF)	58,661.86

Total: \$1,758,320.88

39 Close the next window

The screenshot shows a software interface with a 'Next Step' dialog box open. The dialog box has a close button (an 'X' in a circle) highlighted with a red circle. The background shows a portfolio view with 'Quick Add' and 'Advanced Edit' options, and a 'Results' section displaying 'Risk/Reward' metrics for two items: 'Impact Report Demo Recommendation' and 'Impact Report Demo Current Proposed', both valued at 1.76M.

40 Click the top level existing holdings

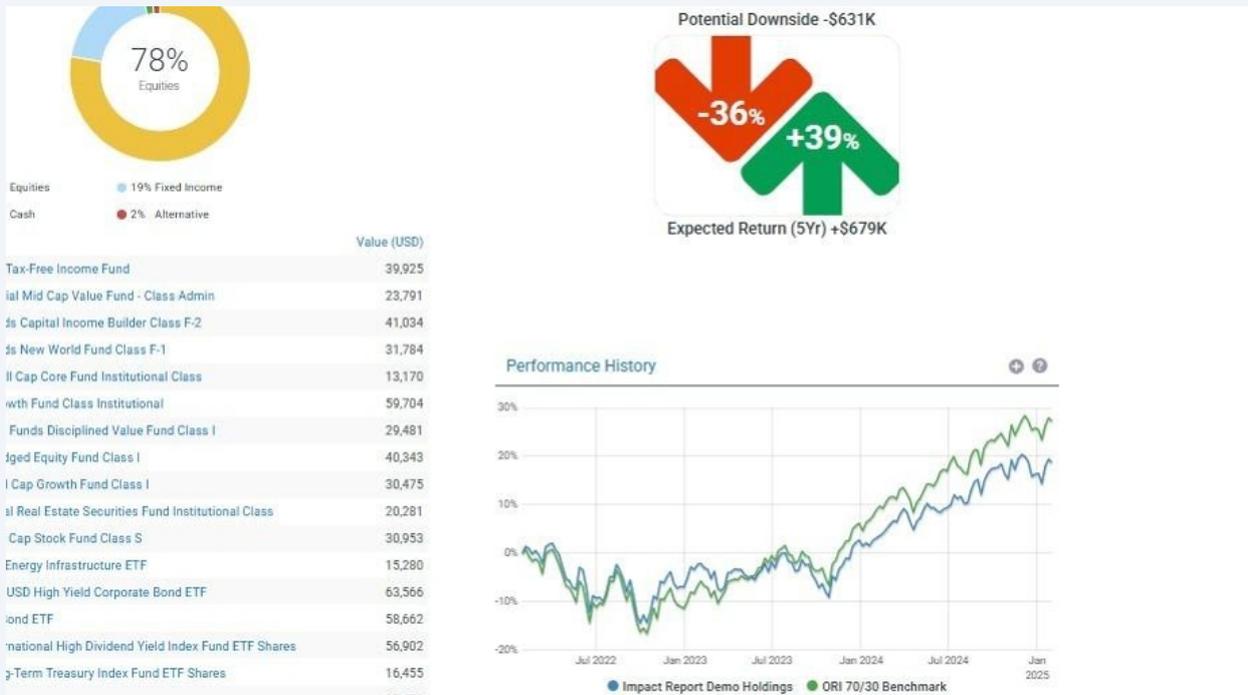
The screenshot shows the 'Impact Report Demo' interface. On the left is a navigation sidebar with sections: 'Merge Client', 'Integrations', 'Freeze Client Portfolios' (toggle), 'Videos' (with a 'HELP VIDEO' thumbnail), 'Client Page Help', and 'How-To' (with links for 'Marketing Materials', 'Client Workflow', and 'Questionnaire Design'). The main content area has two tabs: 'Risk Tolerance' and 'Holdings'. The 'Holdings' tab is active, showing 'Holdings (1.76M USD)'. A table displays 'Risk/Reward' data with two rows, each showing '-36%' and '+39%' with corresponding bar charts. A context menu is open over the 'Holdings' tab, listing options: 'Edit', 'Add portfolios', 'Run Stress Test', 'Risk Profile', and 'Remove'. An orange circle highlights the 'Risk Profile' option.

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

This screenshot is identical to the one above, showing the 'Impact Report Demo' interface with the 'Holdings' tab active and the context menu open. An orange circle highlights the 'Risk Profile' option in the context menu, indicating the next step in the process.

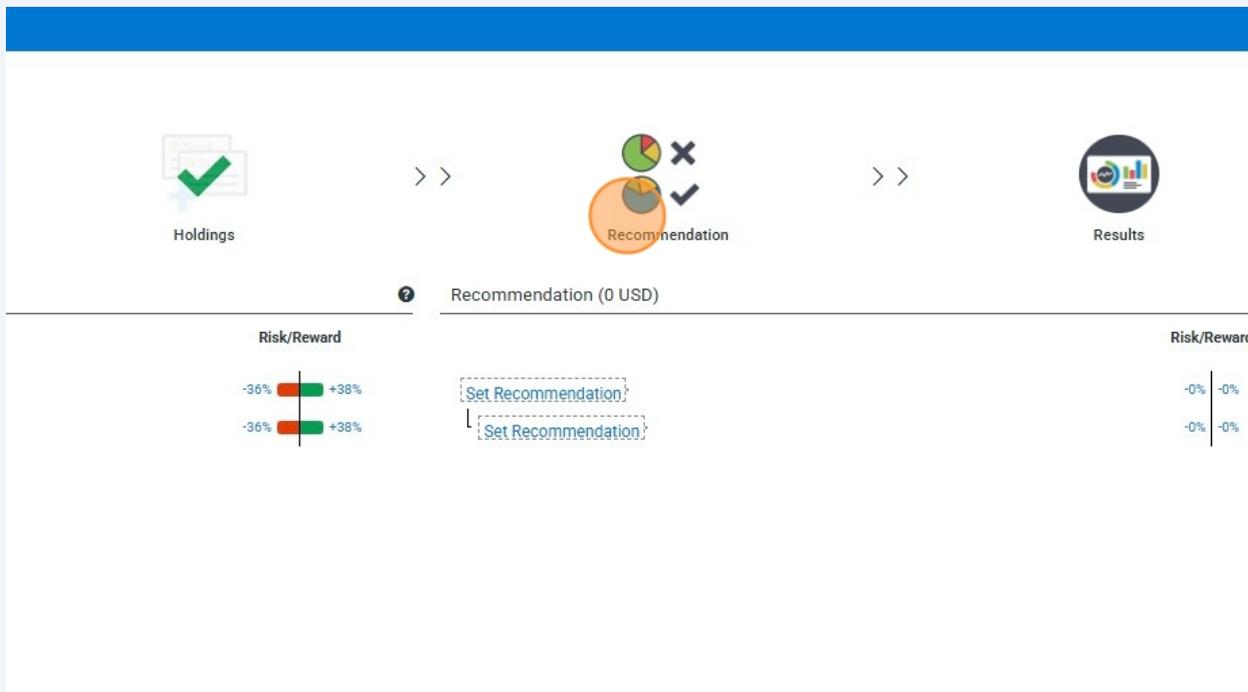
42

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

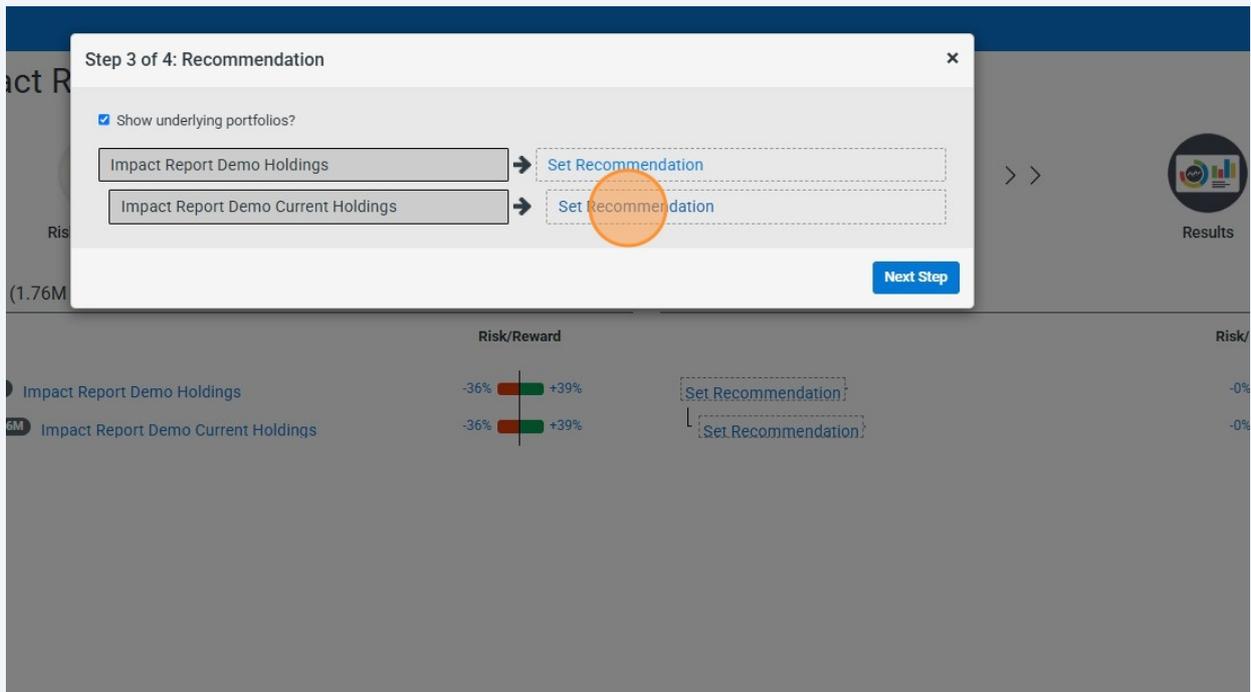


43

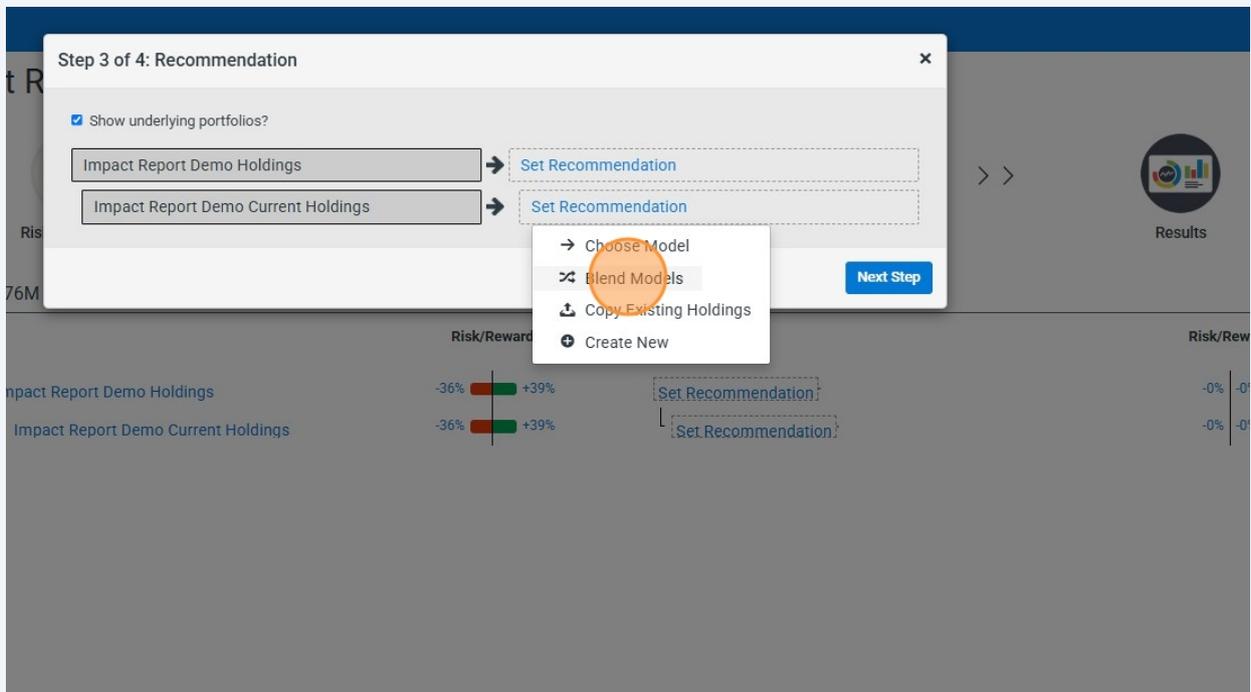
Click "Recommendation"



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

Keep Positions (Optional)

Symbol	Name	Value (USD)	Keep?
AEP	AMER ELECTRIC POW CO	5,323	<input type="checkbox"/>
AMCFX	American Funds AMCAP Fund Class F-2	77,135	<input type="checkbox"/>
AMLPL	Alerian MLP ETF	8,495	<input type="checkbox"/>
APD	AIR PRODUCTS CHEM	6,770	<input type="checkbox"/>
BAB	Invesco Taxable Municipal Bond ETF	6,717	<input type="checkbox"/>
BK	BANK OF NY MELLON CP	11,332	<input type="checkbox"/>
CAIFX	American Funds Capital Income Builder Class F-2	41,034	<input type="checkbox"/>
GOP	CONOCOPHILLIPS	32,572	<input type="checkbox"/>
CSCO	CISCO SYSTEMS INC	7,379	<input type="checkbox"/>
CVX	CHEVRON CORP	6,076	<input type="checkbox"/>
DCCIX	Delaware Small Cap Core Fund Institutional Class	13,170	<input type="checkbox"/>
EGFIX	Edgewood Growth Fund Class Institutional	59,704	<input type="checkbox"/>
EIX	EDISON INTL	3,713	<input type="checkbox"/>
FTHSX	Fuller Thaler Behavioral Small-Cap Equity Fund Institutional Shares	53,462	<input type="checkbox"/>
GAOSX	JPMorgan Global Allocation Fund Class I	40,033	<input type="checkbox"/>
GEHC	GE HealthCare Technologies Inc.	19,479	<input type="checkbox"/>
HD	HOME DEPOT INC	6,665	<input type="checkbox"/>

47

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

Recommendation

Name: Impact Report Demo with BR

Fee %: 0

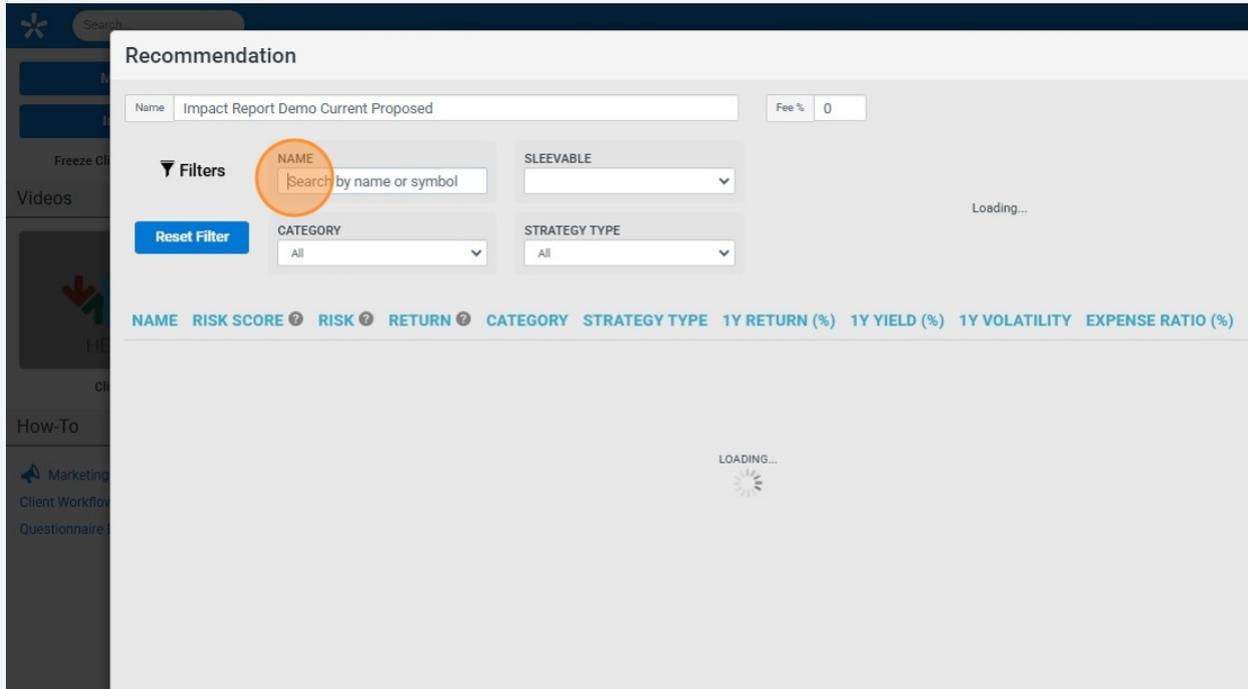
Filters:

- NAME: Search by name or symbol
- SLEEVABLE: Sleeveable (Blendable)
- CATEGORY: All
- STRATEGY TYPE: All
- 1Y RETURN (%): -18 to 798
- 1Y VOLATILITY: 0 to 156

NAME	RISK SCORE	RISK	RETURN	CATEGORY	STRATEGY TYPE	1Y RETURN (%)	1Y YIELD (%)	1Y VOLATILI
BIBL	98	-49	+38	N/A	Strategy	14.71	0.85	15.5
BLES	97	-49	+41	N/A	Strategy	11.14	1.8	12.31
FDLS	47	-23	+73	N/A	Strategy	14.79	6.68	17.26
Inspire Core/Satellite Opportunities	94	-47	+45	N/A	Strategy	10.39	1.81	22.82
Inspire Core/Satellite Opportunities 70/30	61	-31	+32	N/A	Strategy	7.87	2.5	18.06
Inspire CW Active Balanced	32	-16	+28	N/A	Strategy	4.14	2.26	8.65
Inspire CW Active Growth	23	-12	+41	N/A	Strategy	4.82	1.71	11.34

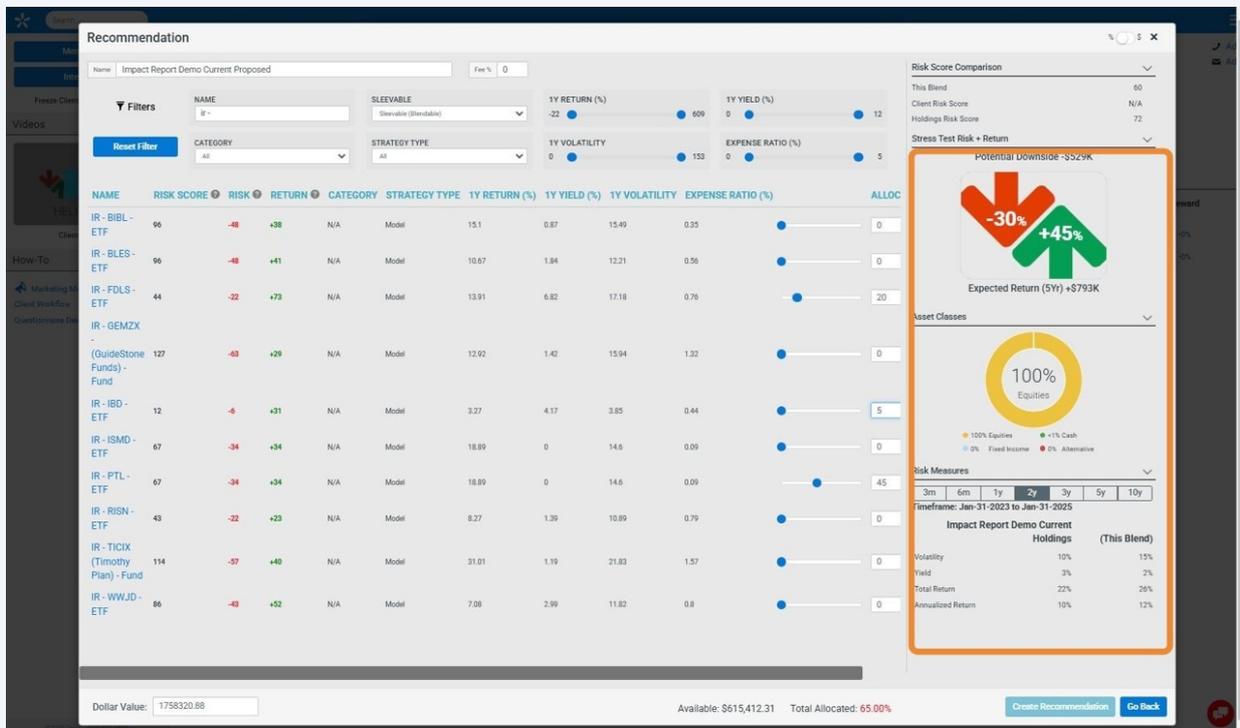
48

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 and performance is satisfactory to you



50

Once you are satisfied with the Recommendation - Click create Recommendation

Asset Allocation Sliders:

1.42	15.94	1.32	0
4.17	3.85	0.44	10
0	14.6	0.09	15
0	14.6	0.09	45
1.39	10.89	0.79	15
1.19	21.83	1.57	0
2.99	11.82	0.8	0

Asset Allocation: 87% Equities, 13% Fixed Income, <1% Cash, 0% Alternative

Risk Measures: 3m, 6m, 1y, 2y, 3y, 5y, 10y

Timeframe: Jan-31-2022 to Jan-31-2025

Impact Report Demo Current Holdings (This Blend)

Volatility	13%	15%
Yield	3%	2%
Total Return	19%	22%
Annualized Return	6%	7%

Available: \$0.00 Total Allocated: 100.00%

Create Recommendation Go Back

51

Click the Results Button

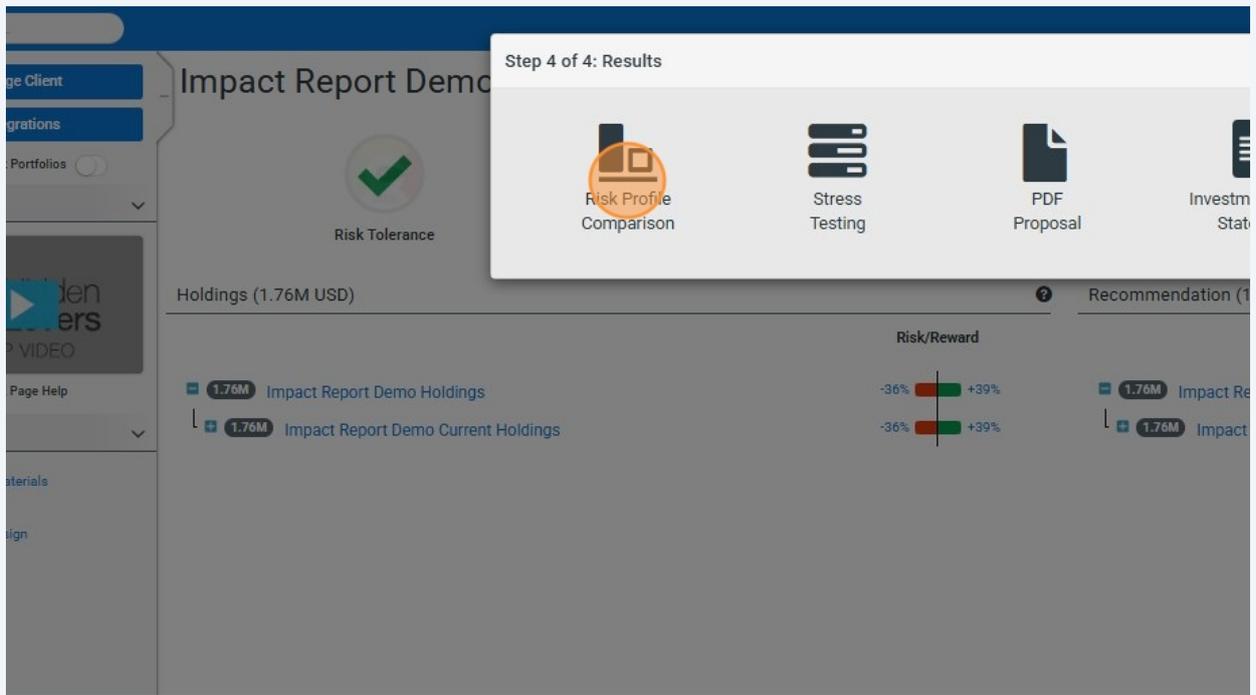
Navigation: Holdings >> Recommendation >> Results

Recommendation (1.76M USD)

Risk/Reward Comparison:

-36%	+39%	1.76M Impact Report Demo Recommendation	-27%	+37%
-36%	+39%	1.76M Impact Report Demo Current Proposed	-27%	+37%

52 Then click the Risk Profile Comparison



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

The screenshot shows a table of performance and risk statistics. At the top, there is a graphic with a red arrow pointing down labeled '-36%' and a green arrow pointing up labeled '+39%', with the text 'Expected Return (5Yr): +\$679K' below it. The table below contains the following data:

Correlation Risk	0.61	
	0.70	
Performance Stats		
Return	18.63%	
Standard Return	5.84%	
Drawdown	-16.17%	
	12.83%	
Other Stats		
	2.58%	
Ratio	0.13	
Ratio	0.22	
Ratio	0.53%	

 Expected Return (5Yr): +\$679K	 Expected Return (5Yr): +\$653K
0.61	0.83
0.70	0.78
18.63%	21.12%
5.84%	6.57%
-16.17%	-15.16%
12.83%	14.19%
2.58%	1.65%
0.13	0.17
0.22	0.29
0.53%	0.33%

54 Click "Back to Client"

✦

Back to Client

Add Portfolios

Edit Page Layout

Run Stress Test

Print

Asset Allocation Level

Basic Detailed Industry

Timeframe: Jan-31-2022 to Jan-31-2025

3m 6m 1y 2y 3y 5y 10y

Custom Timeframe YTD All

How-To

How Does the Stress Test Model Work

The Risk Profile Comparison

Help Videos

Summary

Asset Allocation

Impact Report Demo Holdings (1.76M USD)

78% Equities

19% Fixed Income

2% Cash

2% Alternative

Risk/Return

Potential Downside: -\$631K

Expected Return (5Yr): +\$679K

Risk Stats

55 Click the Results button

The screenshot shows a dashboard with a blue header and a navigation bar. The navigation bar has three items: 'Holdings', 'Recommendation', and 'Results'. The 'Results' item is highlighted with an orange circle. Below the navigation bar, there is a section titled 'Recommendation (1.76M USD)'. This section contains two 'Risk/Reward' charts. The left chart shows a range from -36% to +39%. The right chart shows a range from -27% to +37%. In the center, there is a list of recommendations, including 'Impact Report Demo Recommendation' and 'Impact Report Demo Current Proposed', both with a value of 1.76M.

56 Click PDF proposal

The screenshot shows the same dashboard as in step 55, but with a modal window open. The modal window is titled 'Step 4 of 4: Results' and has a close button (X) in the top right corner. It contains four options: 'Risk Profile Comparison' (with a bar chart icon), 'Stress Testing' (with a list icon), 'PDF Proposal' (with a PDF icon), and 'Investment Policy Statement' (with a document icon). The 'PDF Proposal' option is highlighted with an orange circle. The background of the dashboard is dimmed.

57

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

The screenshot shows the Orion software interface for creating a proposal. On the left is a sidebar with navigation options like 'Proposal Template' and 'My Organization'. The main area contains a form with the following fields:

- Client:** Impact Report Demo
- Prepared For:** Impact Report Demo
- Portfolio 1:** Impact Report Demo Holdings
- Portfolio 2:** Impact Report Demo Recommendation
- Benchmark:** Start typing a portfolio name.
- Timeframe:** 3m, 6m, 1y, 2y, 3y, 5y, 10y. A 'Custom Timeframe' button is also present.
- Template:** My Organization - Impact Report (highlighted with an orange circle)
- Asset Allocation Type:** Basic Asset Classes
- Send to Orion:** Upload Proposal PDF to Orion?

A yellow warning box states: "GEHC : Excluded from charts and risk measures because they have insufficient data for this timeframe." Below the form are sections for 'Scenarios to Run', 'Proposal Sections', and 'Freeform Text Section'.

58

Click the drop down called "Additional Files"

This screenshot shows a detailed view of the 'Proposal Sections' area in the Orion software. The 'Additional Files' dropdown at the bottom is highlighted with an orange circle. The 'Proposal Sections' list includes:

- Risk Profile Summary
- Risk Statistics
- Hypothetical Performance History
- Portfolio Allocations
- Fact Sheet

Below these sections is an 'Unused' area with a trash can icon and the text: "Drag unneeded sections here to remove from proposal". The 'Freeform Text Section' and 'Additional Files' dropdowns are visible at the bottom of the main content area.

59 Select Choose File

SMA:INSPIREFUTURE2025 Oct 18
SMA:INSPIREGLOBVERYCO... Oct 18
SMA:INSPIRECSO7030 Oct 09

Risk Profile Comparison

Impact Report Demo Holdi... Feb 03
Demo Test 13 Holdings and... Feb 03
Demo Test 13 Holdings and... Feb 03

Stress Test

Impact Report Demo Holdi... Feb 03
Daniel Test Holdings Jul 16

IPS

Daniel Test Holdings and 1 ... Aug 12
Daniel Test Holdings and 1 ... Aug 12

Risk Profile Summary

Risk Statistics

Hypothetical Performance History

Portfolio Allocations

Fact Sheet

Unused



Drag unneeded sections here to remove from proposal

Freeform Text Section

Additional Files

This feature allows you to upload files (e.g. marketing materials)

Title

Choose File No file chosen

Submit

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

Save As

Downloads > Needs processing

Organize New folder

Name	Date modified	Type	Size
Impact Report Demo Insight	2/5/2025 12:13 PM	Adobe Acrobat D...	1,632 KB
	2/5/2025 9:50 AM	Adobe Acrobat D...	1,869 KB
	2/5/2025 8:30 AM	Adobe Acrobat D...	1,988 KB
	2/5/2025 8:59 AM	File folder	
	8/7/2024 1:49 PM	Adobe Acrobat D...	2,144 KB
	12/22/2023 12:19 PM	Adobe Acrobat D...	716 KB

File name: Impact Report Demo Insight

Save as type: Adobe Acrobat Document

Save Cancel

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

SMA:INSPIREFUTURE2025 (Oct 18)
SMA:INSPIREGLOBVERYCO... (Oct 18)
SMA:INSPIRECSO7030 (Oct 09)

Risk Profile Comparison

Impact Report Demo Holdi... (Feb 03)
Demo Test 13 Holdings and... (Feb 03)
Demo Test 13 Holdings and... (Feb 03)

Stress Test

Impact Report Demo Holdi... (Feb 06)
Daniel Test Holdings (Jul 16)

IPS

Daniel Test Holdings and 1 ... (Aug 12)
Daniel Test Holdings and 1 ... (Aug 12)

Risk Profile Summary
Risk Statistics
Hypothetical Performance History
Portfolio Allocations
Fact Sheet

Unused

Drag unneeded sections here to remove from proposal

Freeform Text Section

Additional Files

This feature allows you to upload files (e.g. marketing materials)

Title

Choose File Impact Repo...o Insight.pdf

Submit

©2025 Orion 800.277.4830

62 Click "Submit"

SMA:INSPIREFUTURE2025 (Oct 18)
SMA:INSPIREGLOBVERYCO... (Oct 18)
SMA:INSPIRECSO7030 (Oct 09)

Risk Profile Comparison

Impact Report Demo Holdi... (Feb 03)
Demo Test 13 Holdings and... (Feb 03)
Demo Test 13 Holdings and... (Feb 03)

Stress Test

Impact Report Demo Holdi... (Feb 06)
Daniel Test Holdings (Jul 16)

IPS

Daniel Test Holdings and 1 ... (Aug 12)
Daniel Test Holdings and 1 ... (Aug 12)

Risk Profile Summary
Risk Statistics
Hypothetical Performance History
Portfolio Allocations
Fact Sheet

Unused

Drag unneeded sections here to remove from proposal

Freeform Text Section

Additional Files

This feature allows you to upload files (e.g. marketing materials)

Insight Report

Choose File Impact Repo...o Insight.pdf

Submit

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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.

Impact Report Demo (Feb 03)
Impact Report Demo (Feb 03)
Impact Report Demo (Feb 03)

Risk Profile

SMA:INSPIREFUTURE2025 (Oct 18)
SMA:INSPIREGLOBVERYCO... (Oct 18)
SMA:INSPIRECSO7030 (Oct 09)

Risk Profile Comparison

Impact Report Demo Holdi... (Feb 03)
Demo Test 13 Holdings and... (Feb 03)
Demo Test 13 Holdings and... (Feb 03)

Stress Test

Impact Report Demo Holdi... (Feb 03)
Daniel Test Holdings (Jul 16)

IPS

Daniel Test Holdings and 1 ... (Aug 12)
Daniel Test Holdings and 1 ... (Aug 12)

Scenarios to Run

Proposal Sections

- Risk Profile Summary
- Risk Statistics
- Hypothetical Performance History
- Portfolio Allocations
- Fact Sheet
- Insight Report

Unused

Drag unneeded sections here to remove from proposal

Freeform Text Section

64

Adjust the time frame to your preference.

Generate Proposal

Proposal Details

Edit the fields below to customize your proposal.

Client Impact Report Demo

Prepared For Impact Report Demo

Portfolio 1 Impact Report Demo Holdings

Portfolio 2 Impact Report Demo Recommendation

Benchmark Start typing a portfolio name.

Timeframe 2m 6m 1y 2y 3y 5y 10y
Custom Timeframe ALL YTD

Template My Organization - Impact Report

Asset Allocation Type Basic Asset Classes

Send to Orion Upload Proposal PDF to Orion?

GEHC : Excluded from charts and risk measures because they have insufficient data for this timeframe.

Generate

65 Click "Generate"

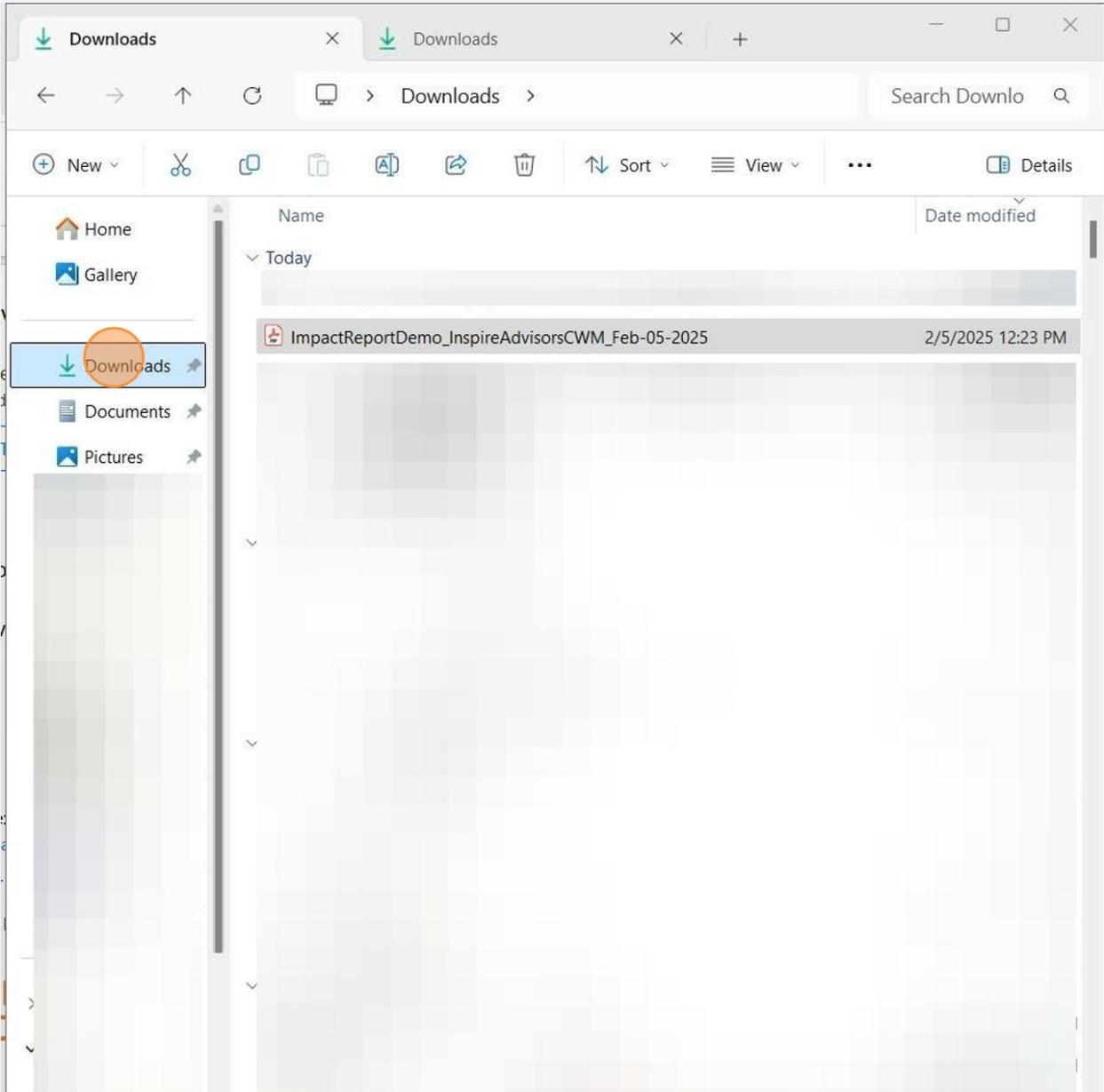
The screenshot shows a web application interface for generating reports. On the left, there is a sidebar with various report categories and their dates: Impact Report Demo (Feb 06, Jan 27, Jul 26), Client (Feb 06, Feb 06, Feb 06), Risk Profile (Oct 18, Oct 18, Oct 09), Risk Profile Comparison (Feb 03, Feb 03, Feb 03), Stress Test (Feb 06, Jul 16), and IPS (Aug 12, Aug 12). The main area contains a form with the following fields: Benchmark (text input), Timeframe (radio buttons for 3m, 6m, 1y, 2y, 3y, 5y, 10y, and a Custom Timeframe button), Template (dropdown menu), Asset Allocation Type (dropdown menu), and Send to Orion (checkbox). A yellow warning message states: "GEHC : Excluded from charts and risk measures because they have insufficient data for this timeframe." Below the form is a "Generate" button, which is circled in orange. Underneath the button are sections for "Scenarios to Run" and "Proposal Sections", with the latter showing a list of report sections: Insight Report, Risk Profile Summary, Risk Statistics, Hypothetical Performance History, and Portfolio Allocations.

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

The screenshot shows a Chrome browser window displaying the same report generation interface as in the previous image. The browser's address bar shows the URL: "9329&launchFromClient=true&p0=243656105&p1=243656111". The browser's toolbar includes a search icon, a star icon, and a download icon, which is circled in orange. The report generation interface is visible below the browser window, showing the same form and warning message as in the previous image.

67

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



68

Click "AVPageView"

