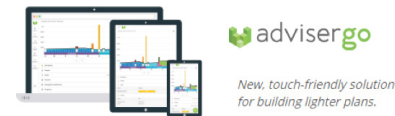# QUICK START GUIDE

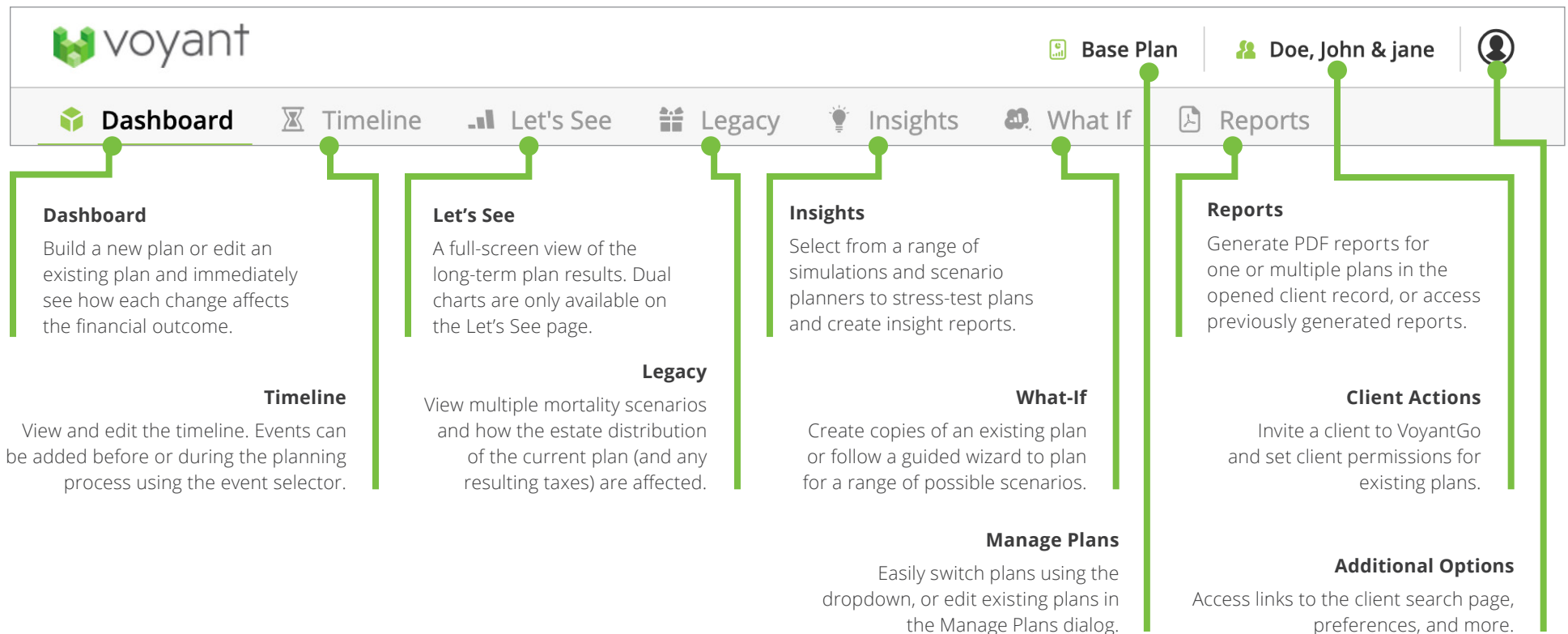## Getting Started with Voyant AdviserGo

Requirements

• Supported Web Browser (Chrome, Safari, Firefox, Opera, Edge, and Internet Explorer 11 or later)

• Internet Connection

• Voyant user account

Getting Started

Sign into our website and click "Go to AdviserGo". Need help signing in? **Learn more.**
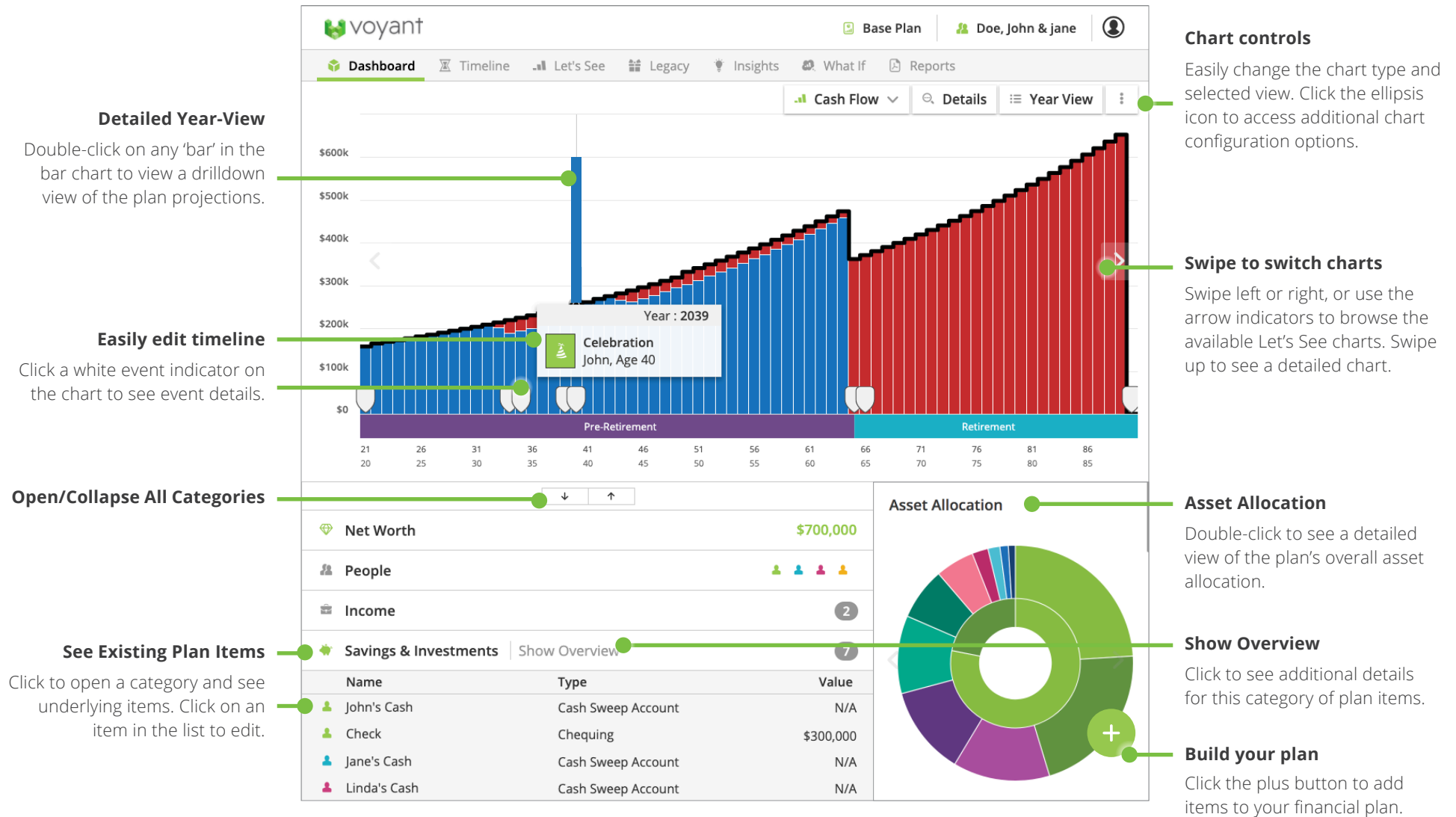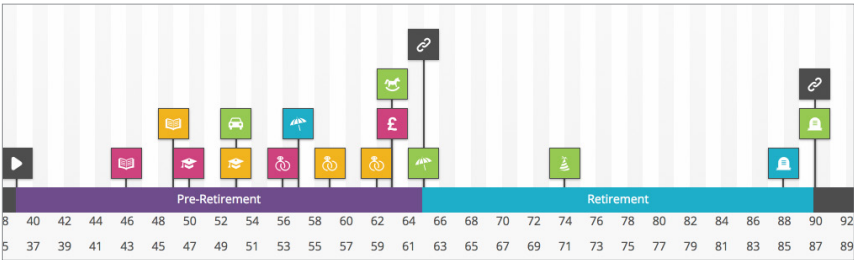
Navigation

Dashboard

Build a new plan or edit an existing plan and immediately see how each change affects the financial outcome.

Timeline

View and edit the timeline. Events can be added before or during the planning process using the event selector.

Let's See

A full-screen view of the long-term plan results. Dual charts are only available on the Let's See page.

Legacy

View multiple mortality scenarios and how the estate distribution of the current plan (and any resulting taxes) are affected.

Insights

Select from a range of simulations and scenario planners to stress-test plans and create insight reports.

What-If

Create copies of an existing plan or follow a guided wizard to plan for a range of possible scenarios.

Manage Plans

Easily switch plans using the dropdown, or edit existing plans in the Manage Plans dialog.

Reports

Generate PDF reports for one or multiple plans in the opened client record, or access previously generated reports.

Client Actions

Invite a client to VoyantGo and set client permissions for existing plans.

Additional Options

Access links to the client search page, preferences, and more.

Dashboard

The Dashboard is a one-stop shop for building your plan. Use the guide below to learn the basics.

Detailed Year-View

Double-click on any 'bar' in the bar chart to view a drilldown view of the plan projections.

Easily edit timeline

Click a white event indicator on the chart to see event details.

Open/Collapse All Categories

See Existing Plan Items

Click to open a category and see underlying items. Click on an item in the list to edit.

Chart controls

Easily change the chart type and selected view. Click the ellipsis icon to access additional chart configuration options.

Swipe to switch charts

Swipe left or right, or use the arrow indicators to browse the available Let's See charts. Swipe up to see a detailed chart.

Asset Allocation

Double-click to see a detailed view of the plan's overall asset allocation.

Show Overview

Click to see additional details for this category of plan items.

Build your plan

Click the plus button to add items to your financial plan.

---

voyant

Base Plan | Doe, John & jane

Dashboard | Timeline | Let's See | Legacy | Insights | What If | Reports

Cash Flow | Details | Year View

Year : 2039
Celebration
John, Age 40

$600k
$500k
$400k
$300k
$200k
$100k
$0

Pre-Retirement | Retirement

| 21 | 26 | 31 | 36 | 41 | 46 | 51 | 56 | 61 | 66 | 71 | 76 | 81 | 86 |
| 20 | 25 | 30 | 35 | 40 | 45 | 50 | 55 | 60 | 65 | 70 | 75 | 80 | 85 |

Net Worth		$700,000
People		
Income		2
Savings & Investments	Show Overview	7

Name	Type	Value
John's Cash	Cash Sweep Account	N/A
Check	Chequing	$300,000
Jane's Cash	Cash Sweep Account	N/A
Linda's Cash	Cash Sweep Account	N/A

Asset Allocation

Building a Plan

Populate your Timeline

The timeline illustrates life as a series of stages and events. Events are used to set the start and end year of plan items and allow for effortless revision. Retirement and mortality goals are automatically created for the primary plan owner and their spouse. Events can be added from the plus button menu or on the timing tab.

Set your Goals

Goals	Show Timeline		1 of 4 goals met
Name	Progress		Amount
Retirement Income	36%		50,000.00
Wedding 💍	100%		125,000.00
Retirement Party 🎉	This goal was met for 2 of 4 years		10,000.00
Pre-Retirement Goal	47%		344,500.00

Goals are prioritized expenses that are linked to specific events. As events are moved on the timeline, goals will automatically re-align with the linked events. Create custom goals or use our pre-built flows for building pre-retirement and retirement goals. Check the status of your goal on the dashboard or the timeline page.

Add the Basics

Build your plan directly from the dashboard. Click the plus button and then select an item type to begin adding items to a plan. The basics tab is where you enter account details, including owner(s), item type, balance and more. Events and goals can also be added from the plus button menu.

Plan for the future
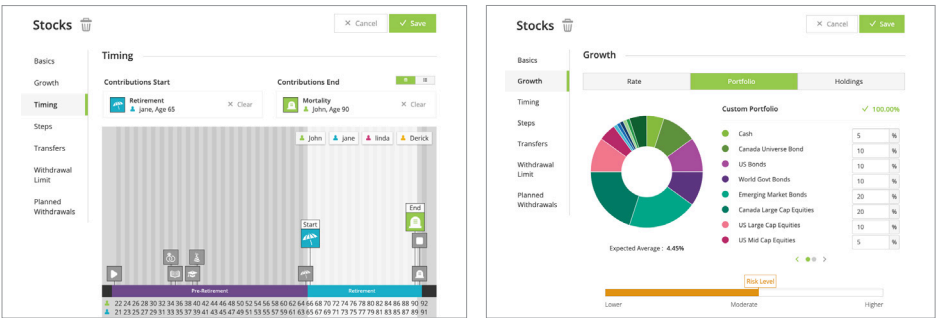
The timing and growth tabs are used to accurately project your account throughout the length of a plan. The timing tab sets the start and end events for each plan item. To set an item's timing, select an event from the timeline below to view timing options. The growth tab is used to project the growth of certain types of plan items.

Looking forward

voyant

Creating a What-If Plan
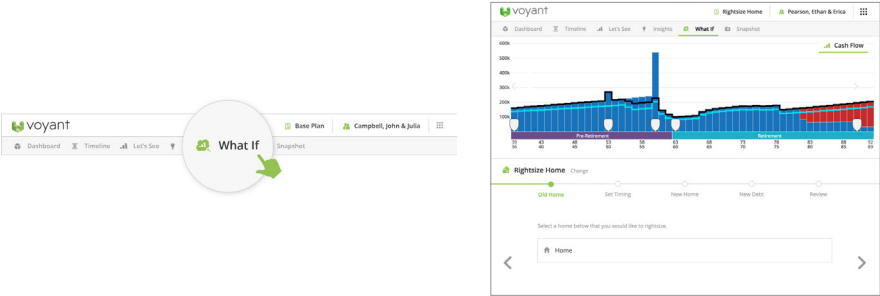
What-if Plans are copies of existing plans that can be used to explore future planning scenarios. To get started, go to the 'What-If' page, accessed from the navigation. Once your new plan is created, you will be switched to that plan. Edit existing items from the dashboard or add items using the plus button.

Guided Plan Creation

	Buy a Home		Change Life Expectancy
	Rightsize Home		Retire Earlier or Later

The guided plan creation tools can be used to plan for common financial scenarios such as early retirement or the downsizing of a family home. As steps are completed, the charts will dynamically update to reflect the changes. Once the wizard is finished, you will be switched to your new plan.

Managing and Comparing Plans
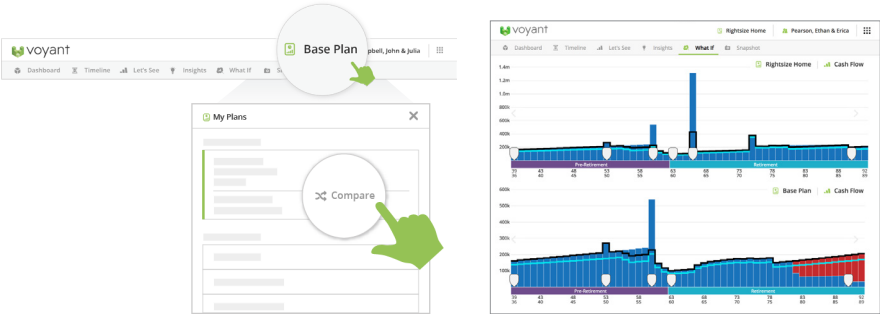
To switch plans and manage existing plans, click the 'My Plans' link in the navigation. Click a plan in the list to view other options, such as Delete or Switch Plans. Click the compare button in the plan options, then select two plans to compare charts.

Insights
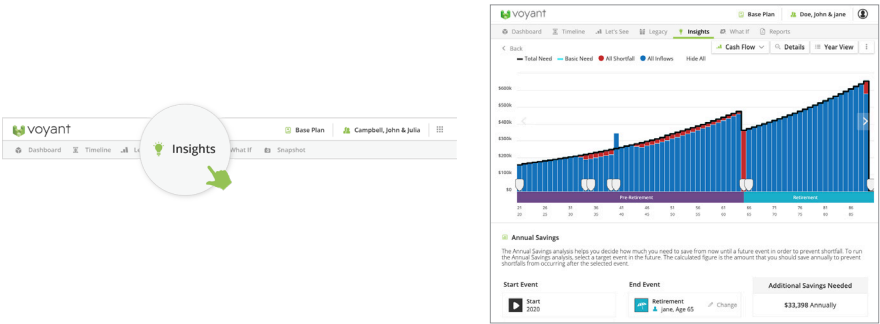
Insights are used to stress-test your plan. To use insights, click the link in the navigation and select a scenario from the list of options to see more details. Click 'explore this scenario' to begin.