RAYMOND JAMES®

GOAL PLANNING & MONITORING

HIDDEN LEVERS

REFERENCE GUIDE

January 23, 2014

NOT FOR CLIENT USE

TABLE OF CONTENTS

INTRODUCTION

According to the HiddenLevers' website: The core technology in HiddenLevers maps the correlations between 130 macro-economic indicators, industries and securities, giving financial professionals new ways to tackle economic uncertainty.

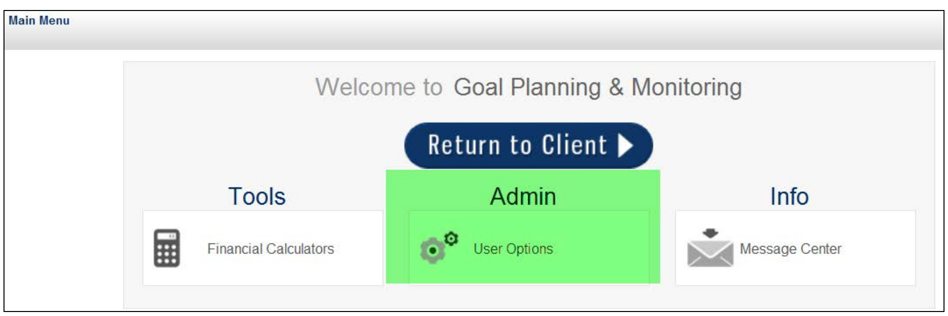
The toolkit includes scenario-based portfolio stress testing, macro scenario modeling, investment screening based on macro trends and client-facing reports and infographics. In a time when managing emotions is just as important as managing money, HiddenLevers helps translate big-picture scenarios into portfolio-specific guidance.

The HiddenLevers' software, data and commentary serve the macro analysis needs of different audiences in the financial markets, including Registered Investment Advisors, Private Wealth Managers, Family Offices, Asset Management, and Portfolio Managers.

For more information on Raymond James pricing and subscription options for HiddenLevers, please visit the Advisor Subscription page on RJnet. A subscription is required in order to use this program with Goal Planning & Monitoring.

SETTING UP ACCESS TO HIDDENLEVERS IN GOAL PLANNING & MONITORING

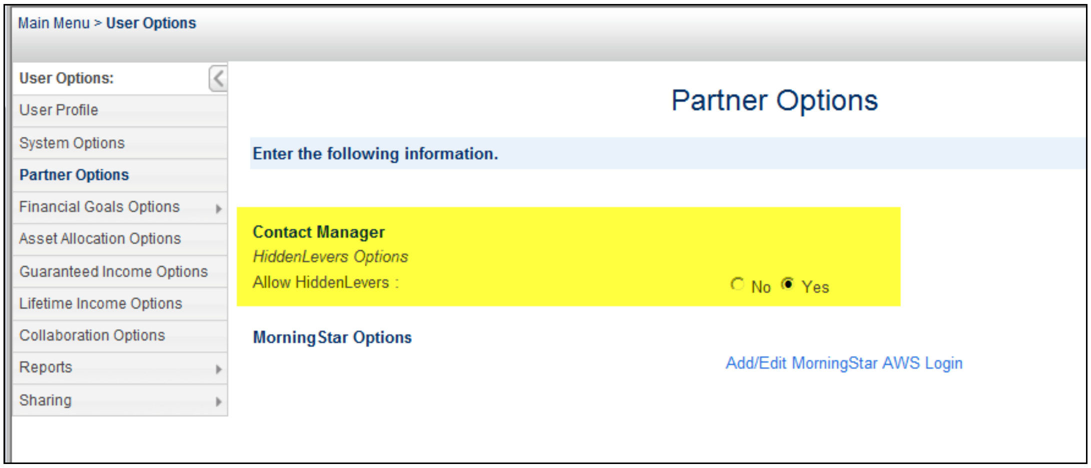
1. Go to **Main Menu > User Options**.



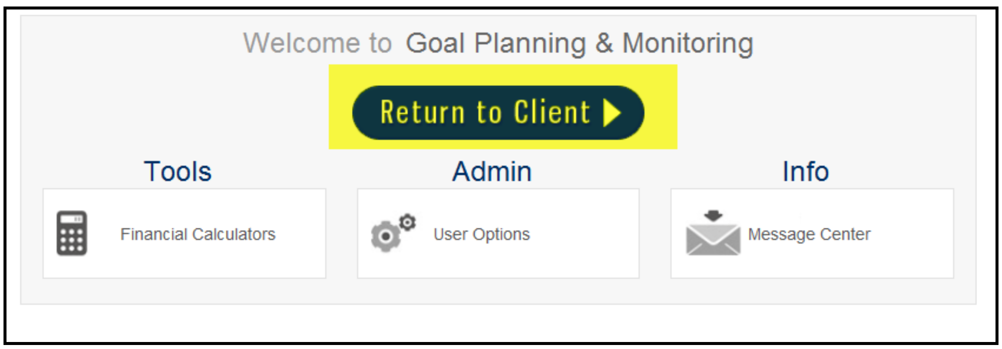
2. Click the **Partner Options** from the left navigation menu.

3. The Partner Options screen appears.

4. Under the Contact Manager area, set the "Allow HiddenLevers" to "Yes."



5. Return to the Client Plan by selecting the Main Menu and "Return to Client" button.



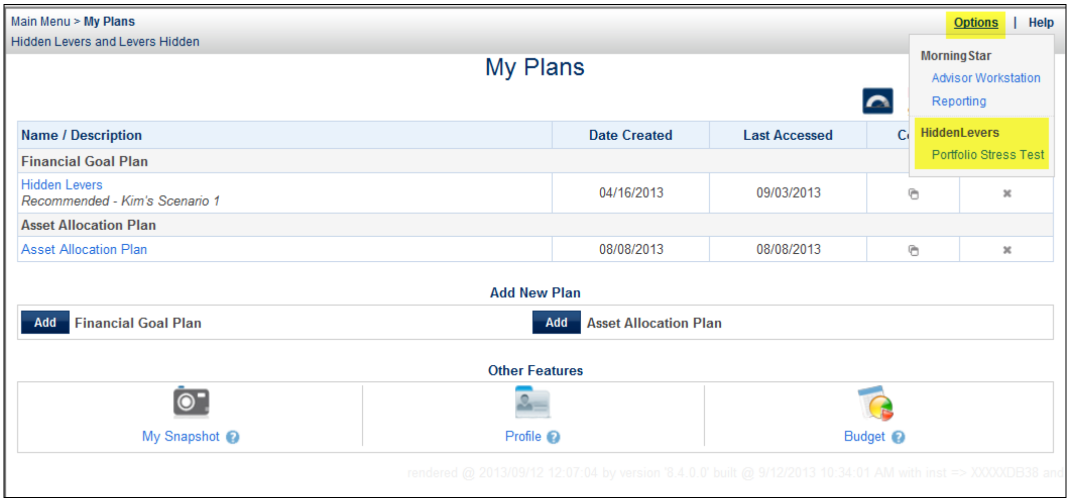
Using HiddenLevers in Goal Planning & Monitoring

Once you've turned HiddenLevers on within Goal Planning & Monitoring, please use these steps below to utilize the feature.

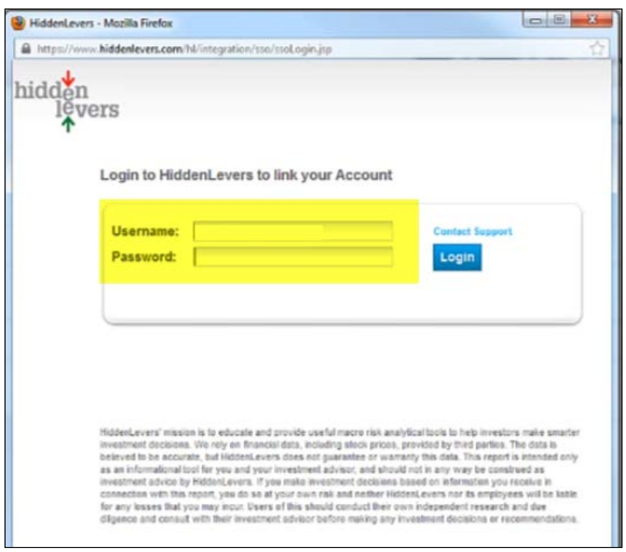
Accessing HiddenLevers

To use HiddenLevers

1. Open the client or prospect you want.
2. Go to GPM's **Main Menu > My Plans**.
3. Click the **Options** link and select **HiddenLevers- Portfolio Stress Test.**



4. The first time you click this link, you will need to enter your Username and Password that you established with your HiddenLevers subscription. After this initial login, you should be able to access HiddenLevers by simply selecting the link without having to reenter this information.



5. You are now ready to use HiddenLevers. The **Options→HiddenLevers→Portfolio Stress Test** is available from any screen within the plan.

Getting More Information

For additional information or assistance, please feel free to contact one of our Wealth, Retirement, & Portfolio Solutions Software team members with the information provided below.

For guidance and training on utilizing the HiddenLevers tool, please contact HiddenLevers support at 404-941-8600 or support@hiddenlevers.com.

Login and Password Issues: Use the lost password button on the login box to get a new password. If you can't remember your login email address, please contact HiddenLevers support at 404-941-8600 or support@hiddenlevers.com.

Wealth, Retirement, & Portfolio Solutions Software Support

Extension: 75392
Email: WRPS.Software@RaymondJames.com

Educational Resources on RJNet

Tips and tools to support Goal Planning & Monitoring
Education Central

Document Revision History

This guide is reviewed and updated as changes in business process or technology dictate.

Date	Description	Approval
01/23/2014	New – Content developed by the Wealth, Retirement & Portfolio Solutions team	Renee Whitehead, Software Analyst Wealth, Retirement Portfolio Solutions Software Support