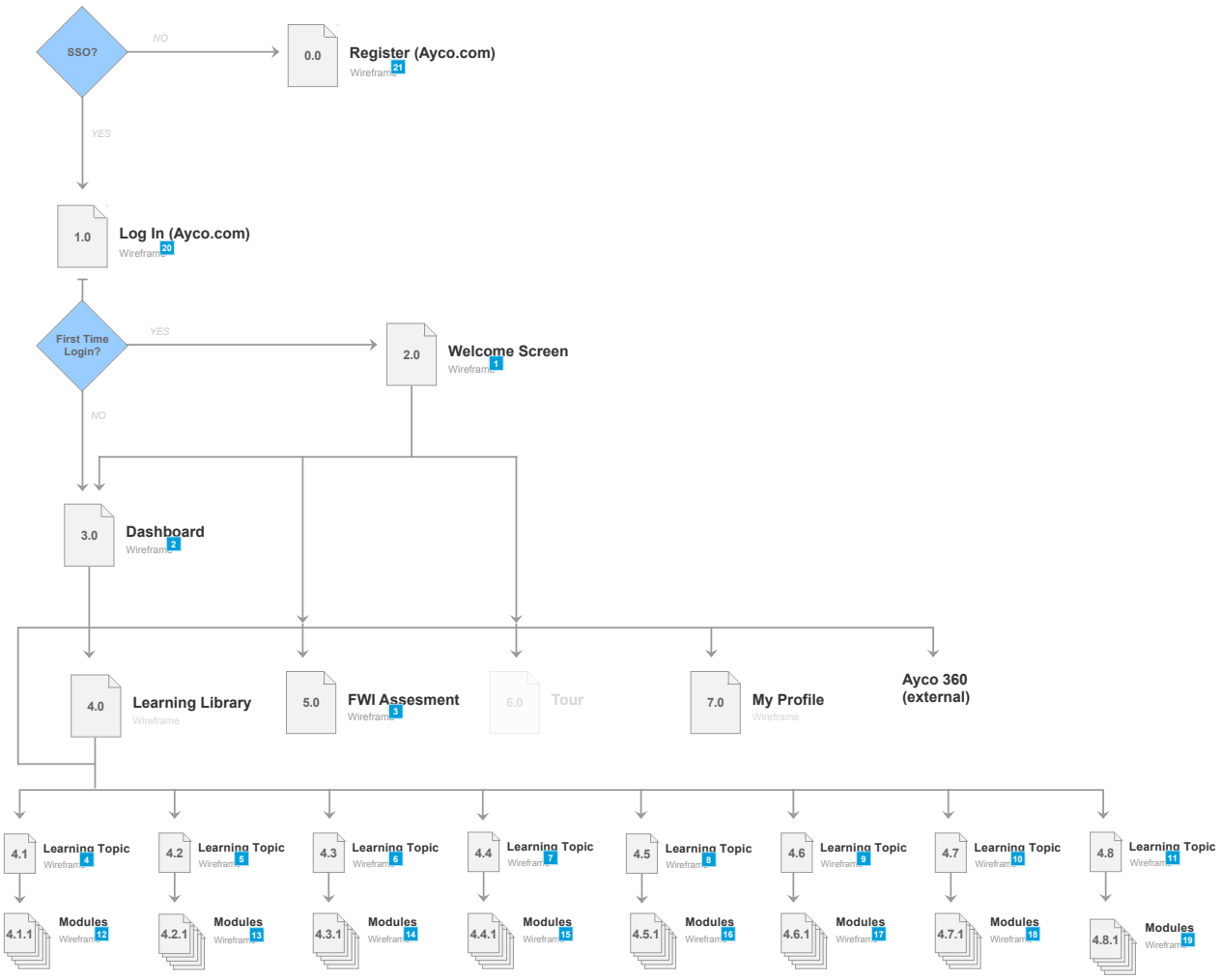
Experience Map Ayco Post-Login R1



Log In 1.0

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REGISTER FOR AYCO

Register now and get access to Aycos premiere line of financial services.

Enter First Name

Enter Last Name

Enter Email

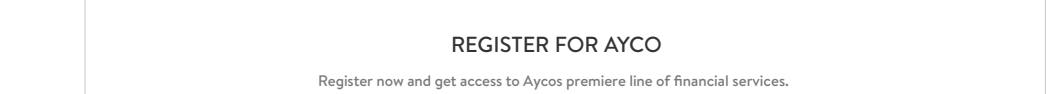
Confirm Email

Enter Phone Number

Enter Social Security Number

REGISTER

Already Have An Account? 1



Mobile Template



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Enter First Name

Enter Last Name

Enter Email

Confirm Email

Enter Phone Number

Enter Social Security Number

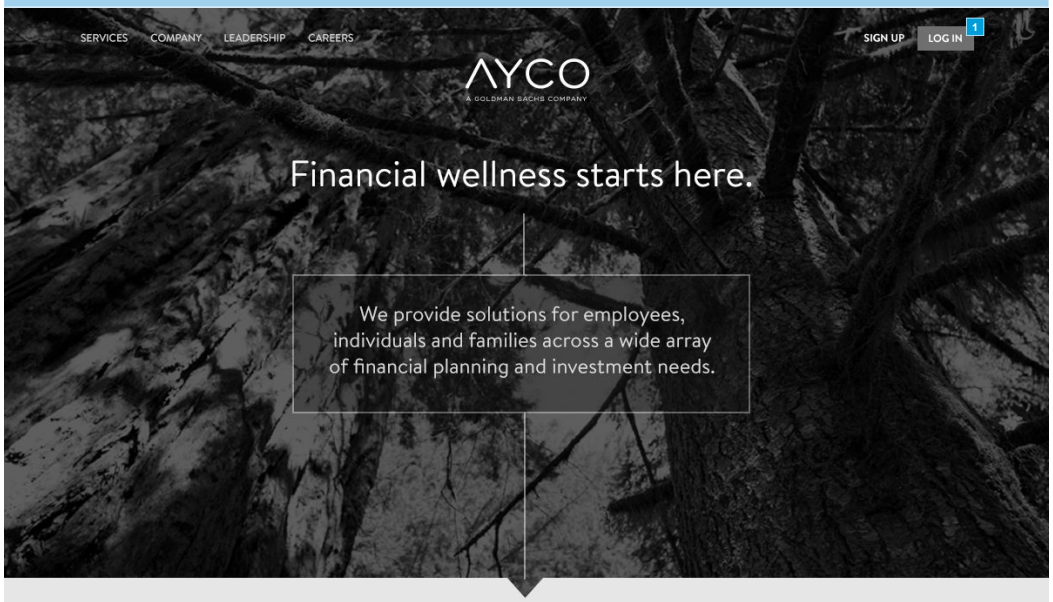
REGISTER

Already Have An Account? 2

Log In 1.0 - Drop Down

WireFrame Drop Down WireFrame Dedicated Page 3

Desktop Template



Ayco for Companies

We help maximize compensation and benefit plans and increase loyalty and retention.

LEARN MORE →

Ayco for Individuals

We provide relationship-driven, holistic financial planning through education and guided implementation.

FIND OUT HOW →

Financial Counseling

We apply world-class research and an unmatched breadth and depth of resources to build clear, continuous and caring financial relationships.

LEARN MORE →

Family Office

We coordinate follow-through across disciplines to provide accessible, personalized financial stewardship for generations.

LEARN MORE →

Invesment Management

We apply expert knowledge and manage risk with discretion and transparency to optimize financial outcomes.

LEARN MORE →

The Latest Insights from Ayco



WHITE PAPER | MARCH 15, 2015

Understanding the Finacial Wellness Index



WHITE PAPER | MARCH 5, 2015

Are You Prepared for Tax Season?



VIDEO | MARCH 2, 2015

Ayco's Tools Yield Positive Results for Employees



VIDEO | FEBRUARY 22, 2015

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Log In 1.0 - Dedicated Page

WireFrame Dropdown 1 **WireFrame Dedicated Page**

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LOG IN

Log in to access your Ayco Dashboard and Ayco 360 account.

Username

Password

LOG IN 4

Need Help Logging In?

Don't Have An Account? Register Now. 2

Mobile Template



LOG IN

Log in to access your
Ayco Dashboard and Ayco 360 account.

Username

Password

LOG IN 5

Need Help Logging In?

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Welcome 2.0 - Version 1

WireFrame Version 1 WireFrame Version 1.1 [5] WireFrame Version 1.2 [6] WireFrame Version 2 [7]

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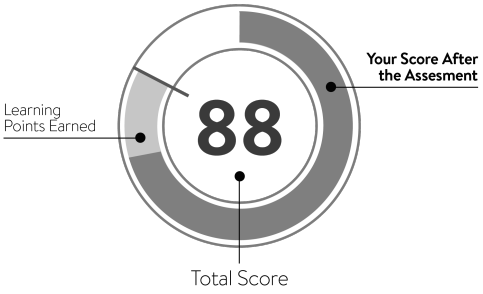
Client Logo

Welcome, Katherine

Your Financial Wellness Index

Whether you're a novice or a financial guru, AYCO's Financial Wellness Index can help you figure out your current financial health. By answering 8 simple questions spanning 8 key financial categories, AYCO can craft a personalized plan to boost your knowledge based on your current score.

Once you've completed the assessment and your score is calculated, you'll be presented with a customized learning path to boost your score and get you closer to meeting your financial goals.



Start Building Your Score → [2]

I'll do this later [1]

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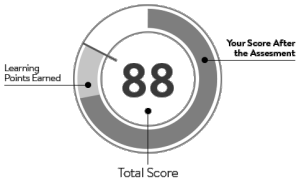
MENU AYCO A SOLOMAN SACHS COMPANY

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I'll do this later [4]

Welcome 2.0 - Version 1.1

WireFrame Version 1 [6] | **WireFrame Version 1.1** | WireFrame Version 1.2 [7] | WireFrame Version 2 [8]

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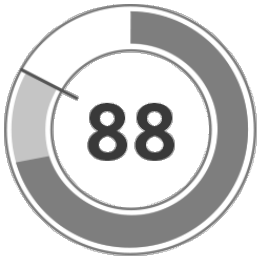
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I'll do this later [3]

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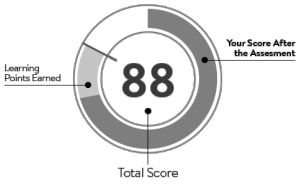
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Start Building Your Score → [4]

I'll do this later [5]

Welcome 2.0 - Version 1.2

WireFrame Version 6 | WireFrame Version 1.1 7 | **WireFrame Version 1.2** | WireFrame Version 8

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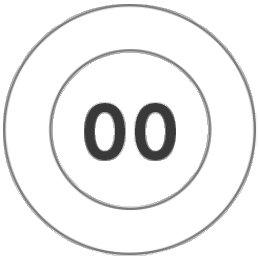
Welcome, Katherine

2

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Your Score After the Assessment

Learning Points Earned

Start Building Your Score → 1

I'll do this later 4

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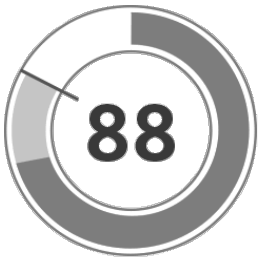
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Your Score After the Assessment

Learning Points Earned

Start Building Your Score → 3

I'll do this later 5

Welcome 2.0 - Version 02

WireFrame Version 6 | WireFrame Version 1.1 7 | WireFrame Version 1.2 8 | **WireFrame Version 2**

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Welcome, Katherine

Your Financial Wellness Index

Whether you're a novice or a financial guru, AYCO's Financial Wellness Index can help you figure out your current financial health and get you closer to meeting your financial goals.



Your Financial Wellness Assessment is made up of 8 simple questions spanning 8 key financial categories.

Start Building Your Score → 1

I'll do this later 2

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Welcome, Katherine

Your Financial Wellness Index

Whether you're a novice or a financial guru, AYCO's Financial Wellness Index can help you figure out your current financial health and get you closer to meeting your financial goals.



Your Financial Wellness Assessment is made up of 8 simple questions spanning 8 key financial categories.



After completing your assessment, you will receive a Financial Wellness Index score.



Your customized learning path, based on your score, allows you to boost your financial wellness.

Start Building Your Score → 3

I'll do this later 4

Dashboard 3.0

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Welcome Back, Katherine

Your Financial Wellness Score



Your Score After the Assessment 72

Learning Points Earned 16

VIEW ASSESSMENT → 1

Pick up where you left off...

MANAGE MY RISK

Creating a Risk Management Plan

13 min | 3 pts

25% Complete

CONTINUE → 2

Your Learning Path

Complete this customized learning path to earn points that will improve your financial wellness score and help you reach your financial goals.

Lesson	Category	Est. Time to Complete	Learning Points	
Saving Against the Future Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa. Cum sociis natoque penatibus et magnis dis.	PLANNING FOR CHANGE	8 min	1 pt	✓ 100% Complete
Creating a Risk Management Plan 3 Aenean massa. Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus.	MANAGING MY RISK 4	13 min	3 pts	25% Complete
Effective Risk Management May Require Culture Change In enim justo, rhoncus ut, imperdiet a, venenatis vitae, justo. Nullam dictum felis eu pede mollis pretium. Integer tincidunt. Cras dapibus.	MANAGING MY RISK	4 min	.5 pt	
Saving Accounts vs. Investments Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa. Cum sociis natoque penatibus et magnis dis.	MY PERSONAL FINANCES	8 min	1 pt	
How to protect you're Family's Financial Future Aenean massa. Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus.	MY PERSONAL FINANCES	14 min	1 pt	
Making Sure Your Health Coverage is the Best Financial Fit Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa. Cum sociis natoque penatibus et magnis dis.	MANAGING MY RISK	5 min	1 pt	

Want more financial advice? SEE ALL LESSONS →

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Welcome Back, Katherine

Your Financial Wellness Score



Your Score After the Assessment 72

Learning Points Earned 16

VIEW ASSESSMENT → 7

Your Learning Path

Complete this customized learning path to earn points that will improve your financial wellness score and help you reach your financial goals.

Saving Against the Future ✓

PLANNING FOR CHANGE | 8 min | 1 pt

100% Complete

Creating a Risk Management Plan 5

MANAGING MY RISK 6 | 13 min | 3 pts

25% Complete

Effective Risk Management Plan May Require Culture Change

MANAGING MY RISK | 4 min | .5 pts

Saving Accounts vs. Investments

MY PERSONAL FINANCES | 8 min | 1 pt

How to Protect your Family's Financial Future

MY PERSONAL FINANCES | 14 min | .5 pts

Making sure your Health Coverage is the Best Financial Fit

MANAGING MY RISK | 5 min | 1 pt

Want more financial advice?

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Learning Topic 4.1

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88 Very Good — Your Overall Score — SEE DETAILS →

Ayco Dashboard > Managing My Risk

Managing My Risk

In the Managing My Risk category you will find a series of learning tools about Risk Management. In addition to learning what Risk Management is you will learn what your risk level is and be guided through creating and implementing a Risk Management Plan.

Learning Points Earned: 4

After the Assessment | Points Earned



Risk Management Basics

This short article will introduce you to the basics of Risk Management. It contains a short questionair tat will show you just home much risk you have in your financial life.

8 min — 1pt — 100% Complete ✓



Effective Risk Management May Require Culture Change

This short video will outline some common ways our culture leads us into more risky financial pattrens.

4 min — .5 pts — 100% Complete ✓



Creating a Risk Management Plan

In this lesson, you will learn what a risk management plan is and the best way you can go about making one. You will complete a worksheet that will you see how much risk you currently have and set up a plan accordingly.

13 min — 3 pts — 25% Complete



Creating a Robust Risk Management Plan

In this interactive seminar you will learn what makes up a solid Risk Management Plan and get started on creating your won personalized plan.

8 min — 1pt



Sticking to the Plan! Risk Management in Your Future Actions

Now that you have a plan what steps do you need to take to make sure you keep on the path? This on line article and short worksheet will help you understand just how you can get off track and what to do if that happens.

14 min — 1pt

Want more on managing my risk?

SEE ALL LESSONS

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Client Logo — Welcome Back, Katherine

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Managing My Risk

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Learning Points Earned: 4

After the Assessment | Points Earned

Risk Management Basics ✓

8 min — 1pt

Effective Risk Management May Require Culture Change ✓

8 min — 1

Creating a Risk Management Plan

13 min — 3 pts

25% Complete

Creating a Robust Risk Management Plan

8 min — 1pt

Sticking to the Plan! Risk Management in Your Future Actions

14 min — 1pts

Want more on managing my risk?

SEE ALL LESSONS →

Learning Module 4.1

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Ayco Dashboard > Managing My Risk > Creating A Risk Management Plan

What's in This Lesson?

1. Introduction
2. How your risk exposure affects your ability to plan for the future.
3. The benefits of low risk investments
4. How having a plan creates peace of mind and financial strength
5. What to do to reduce your risk.

What You Can Do

1. Complete a worksheet on your risk exposure.
2. Outline a risk management plan.
3. Contact your Ayco coach.

Creating a Risk Management Plan

13 min | 3 pts

Introduction

Financial Engineering is a multidisciplinary field drawing from finance and economics, mathematics, statistics, engineering and computational methods. The emphasis of FE & RM Part I will be on the use of simple stochastic models to price derivative securities in various asset classes including equities, fixed income, credit and mortgage-backed securities. We will also consider the role that some of these asset classes played during the financial crisis. A notable feature of this course will be an interview module with Emanuel Derman, the renowned "quant" and best-selling author of "My Life as a Quant". We hope that students who complete the course will begin to understand the "rocket science" behind financial engineering but perhaps more importantly, we hope they will also understand the limitations of this theory in practice and why financial models should always be treated with a healthy degree of skepticism. The follow-on course FE & RM Part II will continue to develop derivatives pricing models but it will also focus on asset allocation and portfolio optimization as well as other applications of financial engineering such as real options, commodity and energy derivatives and algorithmic trading.

How your risk exposure affects your ability to plan for the future.

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RISK EXPOSURE WORKSHEET

How your risk exposure affects your ability to plan for the future.

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How having a risk plan creates peace of mind and financial strength.

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OUTLINE A RISK MANAGEMENT PLAN

What to do to reduce your risk.

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CONTACT YOUR AYCO COACH →

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Creating a Risk Management Plan

13 min | 3 pts

Introduction

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How your risk exposure affects your ability to plan for the future.

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RISK EXPOSURE WORKSHEET

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OUTLINE A RISK MANAGEMENT PLAN

What to do to reduce your risk.

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FWI Assessment 5.0

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Financial Wellness Assessment

Answer the following eight questions for your preliminary financial wellness score. You will learn how financially healthy you are and receive a customized learning path to help you improve your score and get closer to reaching your financial goals.

GROWING MY ASSETS

What is your annual household income?

- ○ < 00,000
- ◉ 00,000 - 00,000
- ○ 00,000 - 00,000
- ○ 00,000 - 00,000
- ○ 00,000 - 00,000
- ○ > 00,000

Why are we asking this?

← PREV | NEXT →

1. Annual household income [1]
2. Best investment
3. Risk comfort level
4. Next big purchase
5. Total investments
6. Debt
7. Retirement plan
8. Most expensive asset

I'll do this later →

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1. Annual household income

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Why are we asking this?

NEXT ↓

2. Best investment
3. Risk comfort level
4. Next big purchase
5. Total investments
6. Debt
7. Retirement plan
8. Most expensive asset

FWI Assessment 5.0 - Version 02

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Financial Wellness Assessment

I'll do this later →

Answer the following eight questions for your preliminary financial wellness score. You will learn how financially healthy you are and receive a customized learning path to help you improve your score and get closer to reaching your financial goals. *For a more accurate score, complete the additional questions within each category.

GROWING MY ASSETS

1. What is your annual household income?

Why are we asking this?

- ○ < 00,000
- ◉ 00,000 - 00,000
- ○ 00,000 - 00,000
- ○ 00,000 - 00,000
- ○ 00,000 - 00,000
- ○ > 00,000

NEXT ↓

This category has more questions

- MY BENEFITS
- TAXES
- MY PERSONAL FINANCES
- PLANNING FOR CHANGE
- MANAGING MY RISK
- PROTECTING MY FAMILY
- DOING SOCIAL GOOD

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GROWING MY ASSETS

1. What is your annual household income?

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- ○ 00,000 - 00,000
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NEXT ↓

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This category has more questions

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- TAXES
- MY PERSONAL FINANCES
- PLANNING FOR CHANGE
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FWI Assessment 5.0 - Over Dashboard

WireFrame v1 | WireFrame v2 | **WireFrame Over Dashboard**

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I'll do this later

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- ○ 00,000 - 00,000
- ○ 00,000 - 00,000
- ○ 00,000 - 00,000
- ○ > 00,000

← PREV

NEXT →

1. Annual household income
2. Best investment
3. Risk comfort level
4. Next big purchase
5. Total investments
6. Debt
7. Retirement plan
8. Most expensive asset

Creating a Risk Management Plan
Aenean massa. Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus.
MANAGING MY RISK | 13 min | 3 pts | 25% Complete

Effective Risk Management May Require Culture Change
In enim justo, rhoncus ut, imperdiet a, venenatis vitae, justo. Nullam dictum felis eu pede mollis pretium. Integer tincidunt. Cras dapibus.
MANAGING MY RISK | 4 min | .5 pts

Saving Accounts vs. Investments
Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa. Cum sociis natoque penatibus et magnis dis.
MY PERSONAL FINANCES | 8 min | 1 pt

How to protect you're Family's Financial Future
Aenean massa. Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus.
MY PERSONAL FINANCES | 14 min | 1 pt

Making Sure Your Health Coverage is the Best Financial Fit
Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa. Cum sociis natoque penatibus et magnis dis.
MANAGING MY RISK | 5 min | 1 pt

Want more financial advice? SEE ALL LESSONS →

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Your Profile

This is you profile, by keeping your information updated we can do a better job helping you achieve your financial goals.

Personal Information

Edit

Name	Firstname, Lastname
Location	City, ST
Gender	Gender
Age	00
Marital Status	Status
Children	00
Preferred Contact	000-000-0000
Total Earned Income	$000,000

This information in confidential and is not shared. Please confirm its accuracy so that we may provide you with the best financial services.

UPDATE

Financial Goals

- Growing My Assets
- My Personal Finances
- Managing My Risk

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Your Profile

Welcome to your profile, by keeping your information updated we can do a better job helping you achieve your financial goals.

Personal Information

Edit

Name	Firstname, Lastname
Location	City, ST
Gender	Gender
Age	00
Marital Status	Status
Children	00
Preferred Contact	000-000-0000
Total Earned Income	$000,000

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Financial Goals

- Growing My Assets
- My Personal Finances
- Managing My Risk

UPDATE