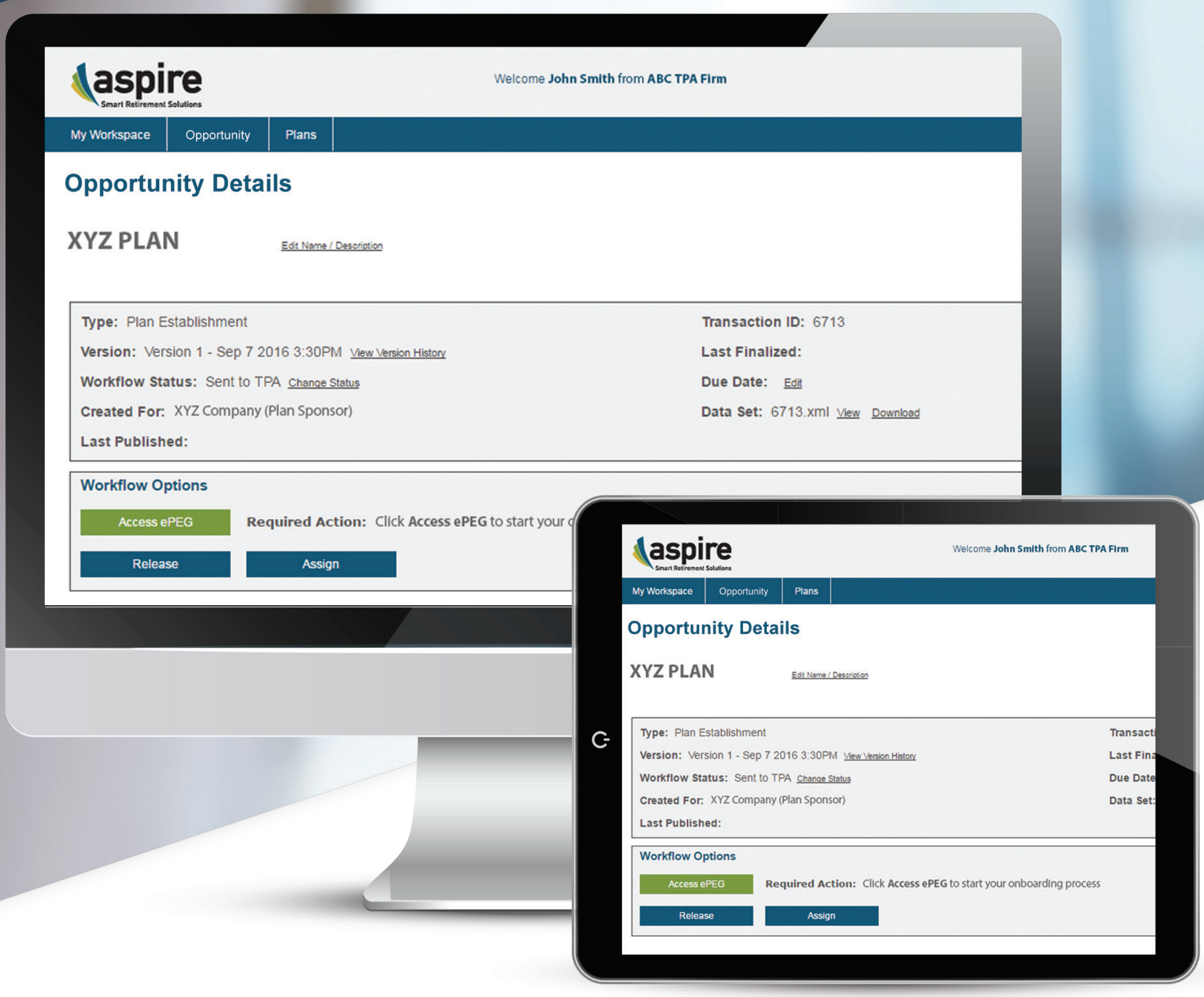
Electronic Plan Establishment Guide (ePEG)

Tips & Tricks

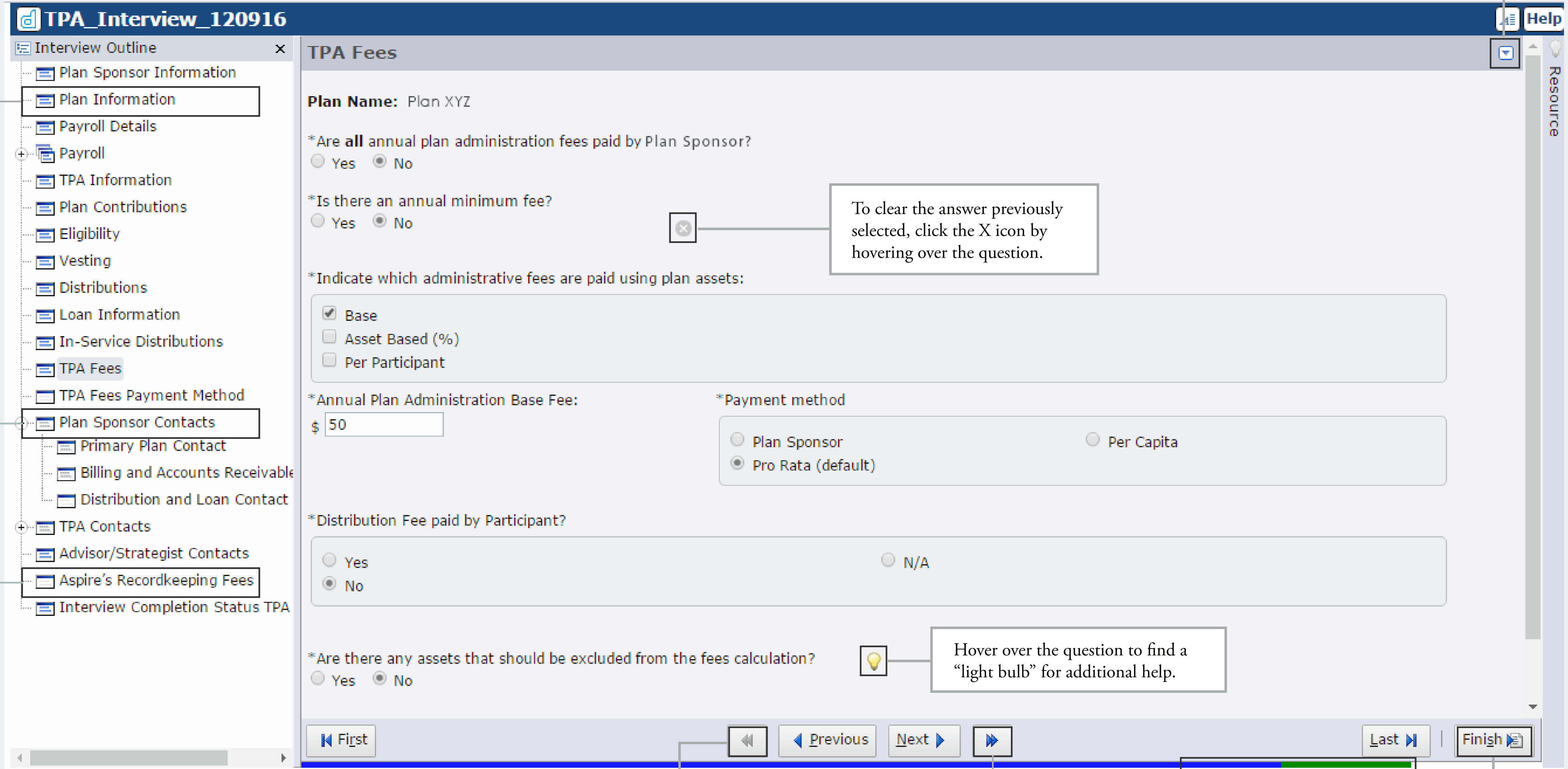


Definitions

Interview: Compilation of questions specifically tailored to TPAs, Advisors and Sponsors to gather information needed to establish a new Opportunity.

Dialog: Series of related questions within an Interview that are centered around specific topics. For example: Contact information, Contributions, Distributions, Fund Lineup, Fees, etc.

Selecting the arrow in the upper-right corner will Erase All Answers within the Dialog.



Dialog is completed.
(Blue lines within the box)

Dialog is partially completed.
(Grey lines within the box)

None of the questions in the dialog have been completed.
(White lines within the box)

To clear the answer previously selected, click the X icon by hovering over the question.

Hover over the question to find a "light bulb" for additional help.

If the double arrows are greyed out, that means there are no unanswered questions.

Selecting the blue double arrows to the left or right will bring you to a dialog with unanswered questions.

Blue progress bar at the bottom lets you know how far along you are within the Interview. When the Blue progress bar turns Green it indicates that all of the questions have been fully answered.

Click the Finish button in the bottom-right corner to close out of the Interview, regardless if you have completed all of the questions. You will be able to access the ePEG later to finish.

ePEG automatically saves answers every 2 minutes.

For more information about Aspire's ePEG, call 866.634.5873 or email NewBusiness@aspireonline.com.

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Aspire Financial Services, LLC is a leading service provider of smart retirement solutions, serving the industry since 2002 with a conflict-free, open-investment retirement planning management system. Aspire provides a best-in-class technology-enabled portfolio of pre-defined or highly customizable smart retirement solutions with private-label branding options through its proprietary technology platform and strategic partnerships. To learn more, visit www.aspireonline.com or call 866.634.5873.

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