

Instructions

Use this handy checklist as a guide for your on-line training program. Watch the videos in this recommended order and if questions arise, contact Advicent Partner Support at 888.692.3474. You are on your way to success using the Advicent tools!

Date Completed	
• Introduction to Profiles Forecaster	☐ _____
• Asset Allocation	☐ _____
• College Funding	☐ _____
• Disability Income	☐ _____
• Long-Term Care	☐ _____
• Retirement	☐ _____
• Survivor Needs	☐ _____