New User Guide

Welcome to the website dedicated to giving you insight into the financial behavior of your clients by offering you proven tools and services unique to the financial services industry.

If you are a new member, this guide will give you an overview of the member section of the site as well as suggest the best place to start. If you have any questions that this guide does not answer, you can email us at info@financialpsychology.com .

After logging in with your specified user name and password, you come to the member home page. This page is designed to keep our members informed about special "members only" promotions and discounts, new product information, live trainings, retreats, surveys and much more! Please check this page for the latest updates as it changes often.

Let's start by going through each of the "Members Only" sections: Products and Services, Moneymax®, My Account, New Users, Download and Logout.

Members Only

Products & Services

View and order all products and services that Financial Psychology offers. When a new product is offered, you will see an announcement on the Member Home Page. It will also be available here under Products and Services.

Moneymax®

In the Moneymax® section, you can download and print Moneymax questionnaires, run Moneymax Profile Reports, go through the **Marketing Guide** and **Training Guide**.

Marketing Guide ¾ Refer to the Marketing Guide for tips on positioning the Moneymax® Profile that will help you market yourself and your business. The Marketing Guide also offers sample letters that you can customize to suit your business style.

This guide will give you insight into how to market to clients with the profile(s) most compatible with your own profile. Learn how to attract the "right" clients and how to avoid potential "problem" clients.

Training Guide ¾ The training guide takes you through a comprehensive overview of the Moneymax Profile Reports. Fill out a Moneymax questionnaire and run a Profile Report on yourself. Refer to your own report while going through the training guide. You'll uncover your own money management style while learning how to position and best utilize the Moneymax Profile with your clients and potential clients.

Run Moneymax ¾ Come here when you are ready to run a Profile. Input your client information and follow the prompts to enter the Moneymax Questionnaire answers and print your report.

Print Questionnaire ¾ Click on this tab when you need to download and print more hard copies of the Moneymax Questionnaire for you clients or potential clients to fill out.

The Moneymax Questionnaire is one page long and has four sections:

- ✓ *Client Contact Information* – name, address, phone, email
- ✓ *Goals & Objectives* – 4 questions to help define your client's most important goals
- ✓ *Investment Preferences* – 7 questions that gather your client's past investment preference history
- ✓ *Moneymax Questionnaire* – 28 questions about your client attitudes and feelings about money. These questions define your client's financial personality and their money management style.

Purchase Profiles ¾ Here you can add profiles to your account as you need them.

My Account

The My Account section of the site keeps all of the personal data in one spot.

Account History ¾ This is where your client data are held. Here you can always review any client's Moneymax® Profile Report. You can also run the Trait Comparison or "Couples" report here. This is a one page report that compares and contrasts clients' financial traits, showing traits that are similar and traits that are different. This report is critical when working with couples.

Account Statistics ¾ The Account Statistics section shows you how your client base breaks out by Moneymax Profile Group. You may find you have a high percentage of one or two profiles. This information can help you target the prospects and clients you desire as well as customizing all of your communication. This database function helps you target your communication and develop your business much more effectively and uniquely.

Review Account Info ¾ This is where you can keep your personal contact information up to date.

Purchase History ¾ You'll find a detailed history of each purchase you make at the www.financialpsychology.com site.

Moneymax 401(k) Manager ¾ This section allows you to manage your 401(k) clients. You can add a company and purchase the desired amount of 401(k) profiles for their employees. You can also manage and print aggregated reports of how each company's employee base breaks out by Moneymax Profile Group. This kind of aggregate information can help you and the company define communication as well as investment options to suit their employee population.

Downloads

Check the Downloads section if you need Adobe Acrobat, Real Player or Flash. Some of these programs are required to use selected products offered by Financial Psychology.

Logout

Click here to end your session on financialpsychology.com. Using the logout function helps you protect your account.