

BROADRIDGE FI360 DECISION OPTIMIZER LOGIN GUIDE

We're excited to introduce Decision Optimizer, our next-generation solution that replaces the IRA Rollover Recommendation Form (IRRF).

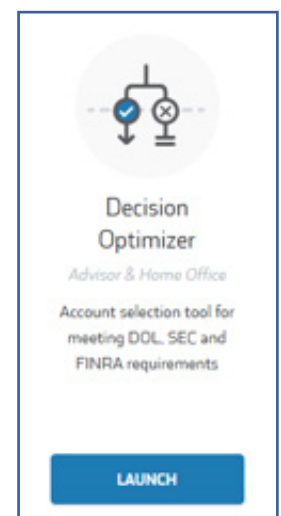
Decision Optimizer is designed to simplify the process by guiding you through the required questions, documenting the rationale for the recommendation, and creating a more efficient and consistent record of the client's investment decision. Whether the recommendation is to roll assets into an IRA, remain in a 401(k) plan, make a strategy change on an existing account, or contribute from non-qualified account, Decision Optimizer provides a clear, visual comparison to support informed decision-making.

Beyond simplifying the process, Decision Optimizer introduces a powerful new capability. The integrated DOL Form 5500 lookup allows users to quickly retrieve a retirement plan's assets under management and participant count. This information automatically populates the fee comparison analysis, saving time, improving accuracy, and helping advisors deliver well-supported recommendations with greater confidence.

Get ready to experience a smarter, faster, and more efficient way to evaluate retirement recommendations with Decision Optimizer.

To setup your Decision Optimizer access, please visit
<https://www.fi360.com/app/security/login>

1. From the login page, click the **RESET YOUR PASSWORD** link.
2. Input your **EMAIL ADDRESS**. (Your email address is also your username)
3. Click the **RESET PASSWORD** button. Please check your email to continue the reset process.
4. In the email you received, click the **Reset My Password** link.
5. Create a personal password that contains at least one numeric, one uppercase letter and a special character (i.e. "!" or "\$".) and click the **RESET PASSWORD & LOGIN** button.
6. Once logged in, you should see the widget to launch Decision Optimizer.
7. Click the **LAUNCH** button to enter Decision Optimizer.



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