

How to Mirror MyPlanIQ Portfolios on FolioInvesting.com

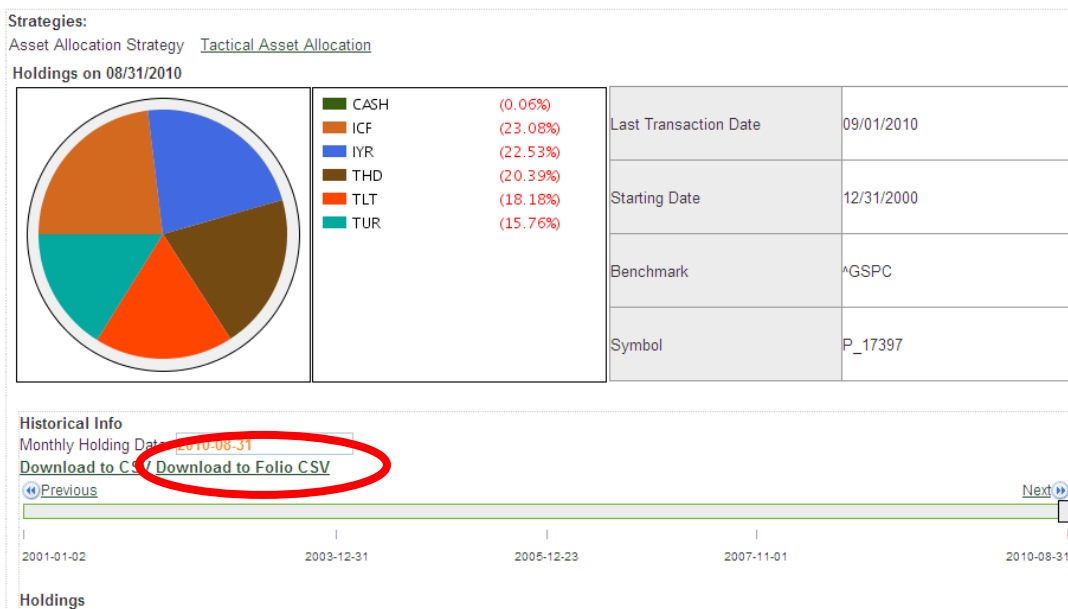
Portfolio Setup & Updates

Now that you have created your My Plan IQ optimized portfolio, we want to make it easy and inexpensive for you to invest in it. We work with the online brokerage Folio Investing to help you connect your research and your investments.

Below are step-by-step instructions with screen shots to show you how to create and update your my Plan IQ portfolio at Folio Investing.

Step 1 – Download file

Download your current My Plan IQ Portfolio holdings by clicking on the Download to Folio CSV link on the My Plan IQ strategy allocation page. Save this file to an easy to remember location.



Step 2 - Login

Visit www.folioinvesting.com and login to your account. If you don't yet have an account, you can open one online by clicking [here](#) or on the Open New Account button on the upper right corner of the page.

Log Into Your Account

Username
 [Forgot username?](#)

Password
 [Reset password?](#)

Remember my Username

By logging in, you agree to any changes in your [membership](#) and [customer](#) agreements, including recent changes to the [IRA](#), [Roth IRA](#) and [SIMPLE IRA](#) agreements.

Step 3 – Add new Folio

After you login at www.folioinvesting.com you will see your accounts and the Folios in each.

To create a new Folio, click the Add New Folio link under the account you want to work with.

Foliofn Inc. (Acct# MA2422000Y)		CORPORATE ACTIVITY	DOWNLOADS	--Account Quick Links--	Go
Folios (Add New Folio)					
Aerospace-NVF (Trade)			\$0.00	--Folio Quick Links--	Go
Aggressive- Test23 (Trade)			\$0.00	--Folio Quick Links--	Go

Then click the Security by Security button on the Create a Folio page.

Create a Folio: *Browse and create a Folio*

Account: **Foliofn Inc.**

[Need Help?](#)

There are several ways you can create your folio:



Ready-to-go Folios

Select a pre-packaged Folio and customize it if you wish.

[Featured Folios](#) [Categories of Folios](#) [A-Z List](#)



Build-your-own Folio

[Security-by-Security](#) Put your own stock picks in a Folio.

[Stock Selector](#) Use tools to screen stocks.

[Move Stocks](#) Move stocks into a new Folio or between Folios.



Get help choosing Folios

[Folio Strategies](#)
See Folios that match basic investment strategies.

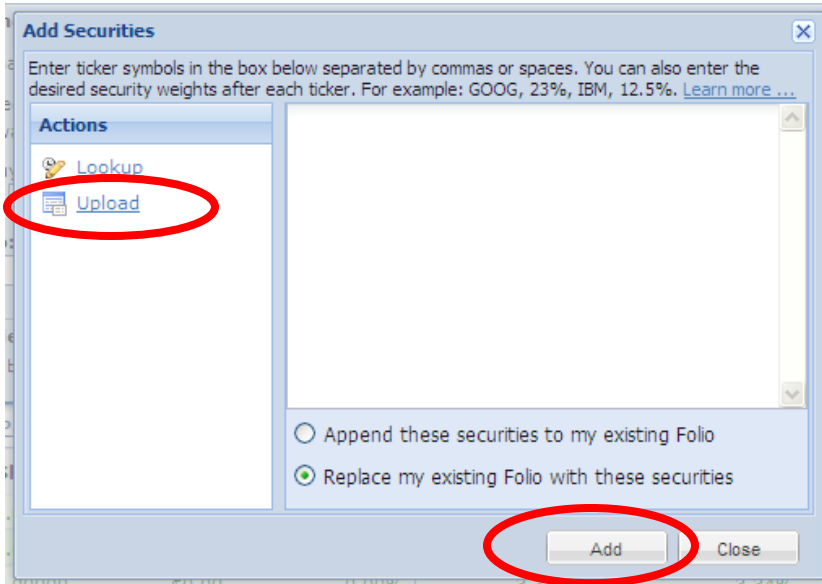
[Investor Questionnaire](#)
Find Folios by answering questions on investing goals and feelings about risk.

[See your Investor Questionnaire](#)

Your most recent profile for this account matched the Long-term Moderate Profile.

[Return To My Accounts](#)

In the window that appears, click the Upload link, then Browse to the My Plan IQ portfolio holdings file that you saved on your computer and then click the Add button.



Review the security symbols and weights and click Continue.

Create A FOLIO: Allocate Weights

Please decide how to allocate your money across these securities.
Click on one of these choices:

SET TO EQUAL WEIGHTS
SET TO MARKET CAP WEIGHTS
SET TO YOUR OWN WEIGHTS

What are [weights](#)?

Need help making a selection?
[See examples.](#)

If you're entering your own weights, the total must equal 100%.

Symbol	Security	Price	Market Cap	Weights
1 IBM	INTERNATIONAL BUSINESS...	\$141.3391	176,390 M	100.00 %
Total				100.00 %

[Add New Securities](#) [See Folio Overview](#) [Continue](#) ➔

[TOP OF PAGE](#)

Then enter the amount of money you would like to invest and the name you would like to give to this portfolio.

Create a Folio: Prepare Order

Account: Foliofn Inc. -- Stock+Lookup

Enter the dollar amount to invest in this Folio:

\$100

Name this Folio:

My First Folio

(Use no more than 25 characters)

Market Value: \$0.00

Amounts Available To Buy:

Stocks and ETFs: \$1,225.54 (Includes amount below for Funds)

Most Mutual Funds: \$1,225.54

Decide what to do with cash distributions (dividends, capital gains, and return of capital):

- Reinvest cash distributions of \$1 or more in the securities that paid them.
Deposit all cash distributions in my account as cash.

Cash distributions of less than \$1 will be deposited in your account as cash.

Market Orders for Folios

Want to send your Folio order directly to the market and bypass a Window Trade? Prepare your trade and on the "Preview and Place Order" page you can change from a Window Trade to a Direct Trade.



Finally review and place the order for these securities, to purchase the My Plan IQ portfolio you downloaded.

Create a Folio: Preview and Place Order

Account: Foliofn Inc.

Need Help?

Order Information

Table with order details: Trade Type: Window Trade, Order Type: Dollar-based, Buy: \$100.00, Sell: \$0.00, Commissions: \$0.00, SRO Fees: \$0.00, Net Change in Cash Fund: (\$100.00), Window Trades Executed this Month: 0

Don't want to wait for the window? Want to specify an execution price for your order? Send this Folio order as a Market/Limit order for a low commission per security.



Account: Foliofn Inc. Folio: My First Folio

Cancel order limit set at: 5.00% change

Select Order Settings

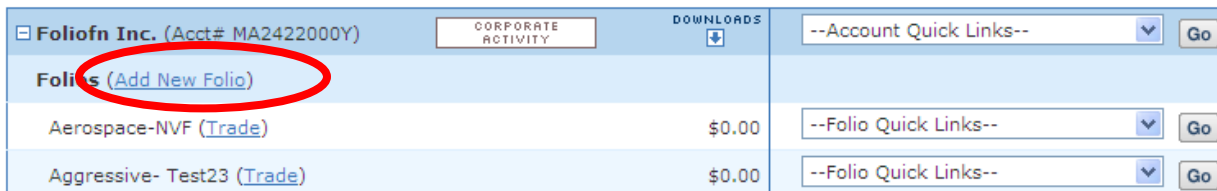
Table with columns: Action, Symbol, Security, Shares, Price per Share, Total Price. Row 1: Buy, IBM, INTERNATIONAL BUSINESS...



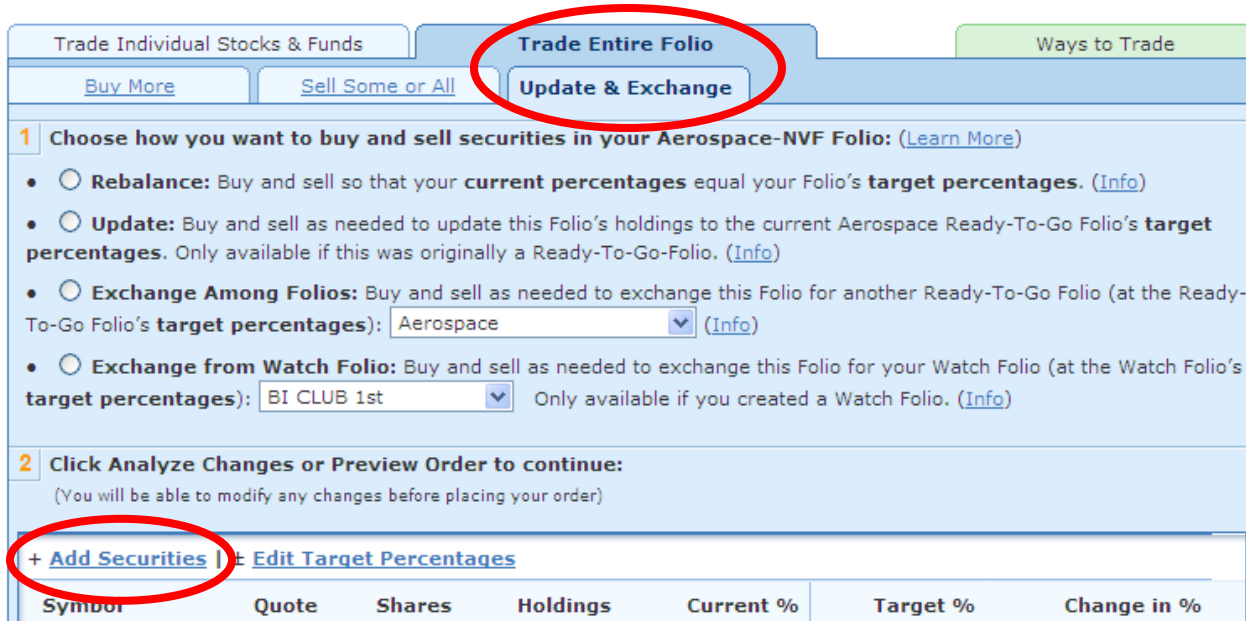
Step 4 – Update a Folio

After you login at www.folioinvesting.com you will see your accounts and the Folios in each.

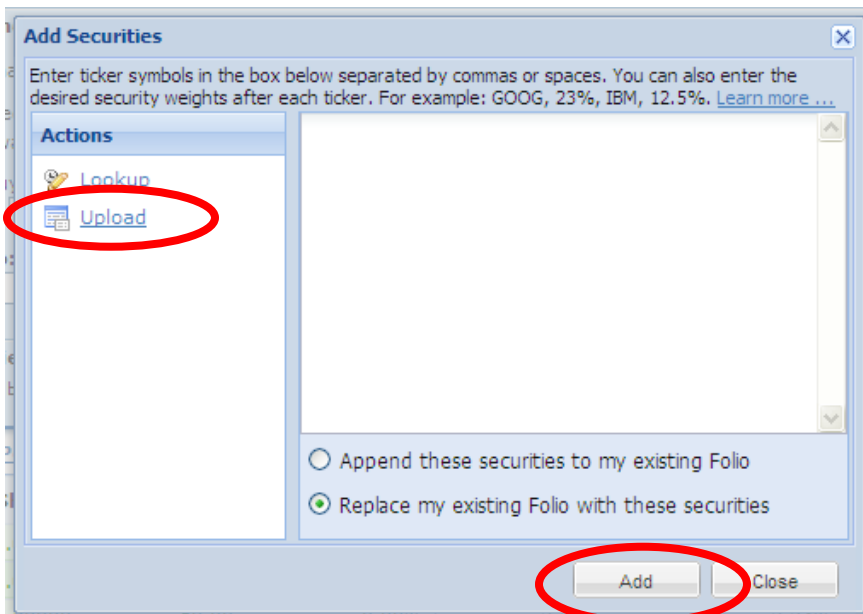
To update a Folio, click the Add New Folio link under the account you want to work with.



On the trading page, click the Trade Entire Folio tab, then the Update & Exchange tab and then click the Add Securities link.



In the window that appears click upload and then browse to the My Plan IQ portfolio holdings file that you saved on your computer. Then click the Replace my existing Folio with these securities button and the Add button.



Then click the Rebalance button and the Preview order button at the bottom of the page.

Trade Individual Stocks & Funds | **Trade Entire Folio** | Ways to Trade

[Buy More](#) | [Sell Some or All](#) | **Update & Exchange**

1 Choose how you want to buy and sell securities in your Aerospace-NVF Folio: ([Learn More](#))

- Rebalance:** Buy and sell so that your **current percentages** equal your Folio's **target percentages**. ([Info](#))
- Update:** Buy and sell as needed to update this Folio's holdings to the current Aerospace Ready-To-Go Folio's **target percentages**. Only available if this was originally a Ready-To-Go-Folio. ([Info](#))
- Exchange Among Folios:** Buy and sell as needed to exchange this Folio for another Ready-To-Go Folio (at the Ready-To-Go Folio's **target percentages**): Aerospace ([Info](#))
- Exchange from Watch Folio:** Buy and sell as needed to exchange this Folio for your Watch Folio (at the Watch Folio's **target percentages**): BI CLUB 1st Only available if you created a Watch Folio. ([Info](#))

2 Click **Analyze Changes** or **Preview Order** to continue:
(You will be able to modify any changes before placing your order)

+ [Add Securities](#) | ± [Edit Target Percentages](#)

Symbol	Quote	Shares	Holdings	Current %	Target %	Change in %
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Lastly, click the Place Order button to enter all of the buy and sell orders necessary to update this Folio to the My Plan IQ portfolio holdings you downloaded.

Create a Folio: *Preview and Place Order*

Account: **Foliofn Inc.**

[Need Help?](#)

Order Information

Trade Type:	Window Trade	Change
Order Type:	Dollar-based	Change
Buy:	\$100.00	
Sell:	\$0.00	
Commissions:	\$0.00	
SRO Fees:	\$0.00	
Net Change in Cash Fund:	(\$100.00)	
Window Trades Executed this Month:	0	More Info

Don't want to wait for the window? Want to specify an execution price for your order? Send this Folio order as a Market/Limit order for a low commission per security. [learn more](#)

[Convert to Market/Limit Order](#)

Account: Foliofn Inc.
Folio: My First Folio

Cancel order limit set at: 5.00% [change](#)

Select Order Settings

Action	Symbol	Security	Shares	Price per Share	Total Price
1 Buy	IBM	INTERNATIONAL BUSINESS...	0.70752	\$141.3391	\$100.00

[Cancel](#) [Save to FolioWatch](#) [Modify Order](#) **[Place Order](#)**