

White Label Insights - Instructions



To personalize the newsletter, please follow the steps below:

1. Open the newsletter in Microsoft Word (preferably 2016 edition) for Windows or Mac.
2. If the document is read-only:
 - a. Windows: Click on "Edit Document" button to open an editable copy.
 - b. Mac: Click on "Duplicate" button and save file under a new name to create an editable copy.
3. Save an image file of your logo on your computer.
4. Click on the "Your Logo Here" box. Then:
 - a. Windows: Choose "Format" from the main toolbar. Click on Shape Fill->Picture->From a File and choose your logo image.
 - b. Mac: Choose "Insert" from the main toolbar. Click on Pictures->Picture->Picture from File...] and choose your logo image.
5. Position the logo as you wish.
6. Double-click on the text in the "Your Contact Info" box and type your contact information. Format the text as you wish.
7. Click on the "Your Disclosure Statement Here" and add any required compliance statements. (Add another page to include additional compliance info if necessary.)
8. Save document as a PDF.
9. E-mail your client the PDF.

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