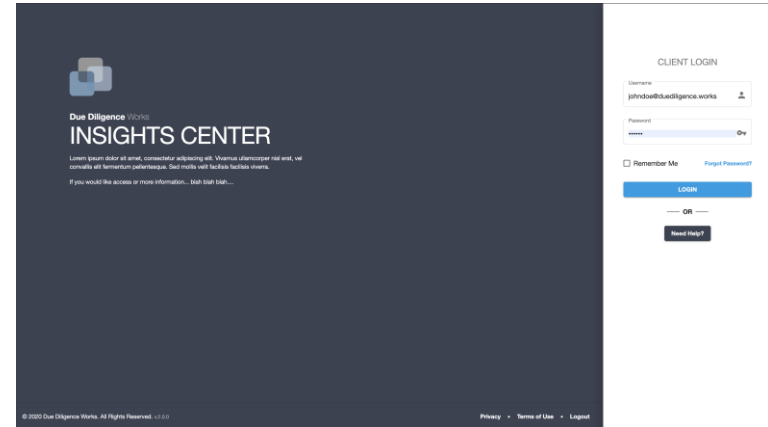


DDW is Investing for You – DDW's Insights Center

- Enhanced Reg BI features
 - Compare Annuities, Mutual Funds, ETFs, UITs, Managed Accounts against each other
- Easier Access to Research
- New Look and Feel, Search and Filters
- Admin Tools for Home Office
- Much Much More



Carrier	Type	Class	Risk	Consistency	Expenses	Total Return	Protection	Total Result	Compare
Capital Research & Management Company			1	2	3	9	8	99	○
Capital Research & Management Company									○
Capital Research & Management Company									○
MFS Investment Management									○
Capital Research & Management Company									○
Capital Research & Management Company									○
MFS Investment Management									○
MFS Investment Management									○
MFS Investment Management									○
MFS Investment Management									○

Product Category	Variable Annuity	Index Annuity	Mutual Fund	ETF
Company Name	Annuity Company	Annuity Company	Mutual Fund Company	ETF Company
Company Rating (S&P)	A+	A	A+	A+
Product Name	Name	Name	Name	Name
Asset Class / Client Need	Income Later	Accumulation	Large Cap	Large Cap
Income Benefits	Yes	No	No	No
Accumulation Benefits	Yes	No	No	No
M&E Expense	1.30%	NA	NA	NA
Rider Expense	1.25%	NA	NA	NA
Expense Ratio	0.38%-0.105%	NA	1.80%	0.28%

Portal Sign On

- Your Branding, can go here, or ours, you pick
- Remove this screen altogether with enhanced single sign on
- Access to products you use,
 - Brokerage: Mutual Funds, ETFs, UITs, Life Insurance
 - Managed Account: Mutual Fund, ETF, SMA, FSP
- Continued access to relevant research in plain English and actual recommendations
- Easier to produce, configure and store information and reports

The screenshot shows the 'CLIENT LOGIN' interface for the 'Due Diligence Works INSIGHTS CENTER'. The left side features the company logo and branding, while the right side contains the login form with fields for Username and Password, a 'Remember Me' checkbox, a 'Forgot Password?' link, a 'LOGIN' button, an 'OR' separator, and a 'Need Help?' button. The footer includes copyright information and links for Privacy, Terms of Use, and Logout.

Due Diligence Works
INSIGHTS CENTER

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Vivamus ullamcorper nisl erat, vel convallis elit fermentum pellentesque. Sed mollis velit facilisis facilisis viverra.
 If you would like access or more information... blah blah blah...

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Privacy • Terms of Use • Logout

CLIENT LOGIN

Username
 johndoe@duediligence.works

Password

Remember Me [Forgot Password?](#)

LOGIN

— OR —

Need Help?

Product Research

- Continued access to product research with updated look and feel
- Easier to sort, filter, and consume information
- Enhanced Administrative tool for home offices
- Select products you want to recommend, and add to the Reg BI Compare Tool

The screenshot shows the 'Insights Center' interface. On the left is a dark sidebar with a 'WELCOME' section and a 'My Vault' section. Below these are 'PRODUCTS' and 'MANAGE' sections. The 'PRODUCTS' section is expanded to show 'Mutual Funds'. The main content area displays a table of investment products. The table has the following columns: Carrier, Type, Class, Risk, Consistency, Expenses, Total Return, Protection, Total Result, and Compare. The table lists several products from Capital Research & Management Company and MFS Investment Management. At the bottom of the table, there is a pagination control showing 'Items per page: 50' and '1 - 50 of 300'. The footer contains '© 2020 Due Diligence Works, Inc.' and navigation links for 'Trello', 'Privacy', 'Terms of Use', and 'Logout'.

Carrier	Type	Class	Risk	Consistency	Expenses	Total Return	Protection	Total Result	Compare
Capital Research & Management Company			1	2	3	9	8	99	○
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Capital Research & Management Company									○
MFS Investment Management									○
MFS Investment Management									○
MFS Investment Management									○
MFS Investment Management									○



Compare Tool

- Compare Tool can look across product types and within product categories
- Roll overs allow for additional detail, while keeping it simple and easy to read
- Provide ability to understand what clients are paying for, and allow Rep and Supervision to decide if it is worth the cost
- Save and store the outcome with the trade recommendation, to review when approving a trade, and for future reference when someone asks down the road

Product Comparison

Product Category	Variable Annuity	Index Annuity	Mutual Fund	ETF
Company Name	Annuity Company	Annuity Company	Mutual Fund Company	ETF Company
Company Rating (S&P)	A+	A	A+	A+
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Items per page: 50

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Trello • Privacy • Terms of Use • Logout

Callout box for Income Benefits:

- Offers guaranteed income income plan
- Prior to the first withdrawal, income base
- After the first withdrawal, income base
- 5% simple Minimum Income Base