

RECOMMENDED SYSTEM SETTINGS

WEALTH MANAGER

Browser and Operating Systems

To ensure a satisfactory experience, Wealth Manager has been verified for compatibility for use with the following browsers and operating systems. This information is also contained in the Help section on the website.

Compatible Browser	Compatible Operating Systems
IE 8.0*	Vista, Windows XP, Windows 7
IE 9.0	Vista, Windows 7
IE 10.0	Windows 7, Windows 8
FireFox	Vista, Windows XP, Windows 7
Google Chrome	Vista, Windows XP, Windows 7
Safari	Mac OS X v 10.6 "Snow Leopard" Mac OS X v10.7 "Lion"

*Some IE8 users may experience slower response times when viewing large amounts of data. If you experience slow response times, you may take advantage of the Google Chrome Frame plug-in feature. Chrome Frame plug-in improves the performance of IE8 by using the Google Chrome open Web Technologies and JavaScript engine to process information in an efficient and effective manner, resulting in faster page loading and response time. The link to download the plug-in can be found within our site by clicking Links in the Menu area.



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PC and Browser Settings

To run the product effectively, adherence to the following minimum workstation characteristics is recommended. Performance issues may arise if workstations fall below these minimum recommendations.

Component	Standard
CPU	1.5 GHz minimum, Duo Core 2.0 GHz or higher recommended
RAM	RAM 1G required minimum, 2G recommended
Video Adaptor	1024 x 768 or greater resolution
Web Browser	Compatible browser
Additional Software Recommended	Microsoft ® Excel ® 2003 or 2007 Adobe® Acrobat® Reader 8.0 or newer

Screen Resolution

To maximize the amount of data displayed on the pages, it is recommended that each workstation's resolution be set to 1024 x 768 pixels or higher.

Windows Settings

Use the following procedure to adjust the Folder Options in Windows Explorer:

1. Select Tools.
2. Select Folder Options.
3. Select the File Types tab.
4. Select the XLS (Microsoft Excel Worksheet) file type.
5. Click the Advanced button.
6. Verify that the Browse in Same Window option is OFF (not checked).



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Browser Settings

- Browser cache option set to Every Time.
- Cookie options set to On.
- Enable automatic prompting for downloaded files.
- Text size set to smaller.
- Enable active scripting.
- Allow META REFRESH.



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