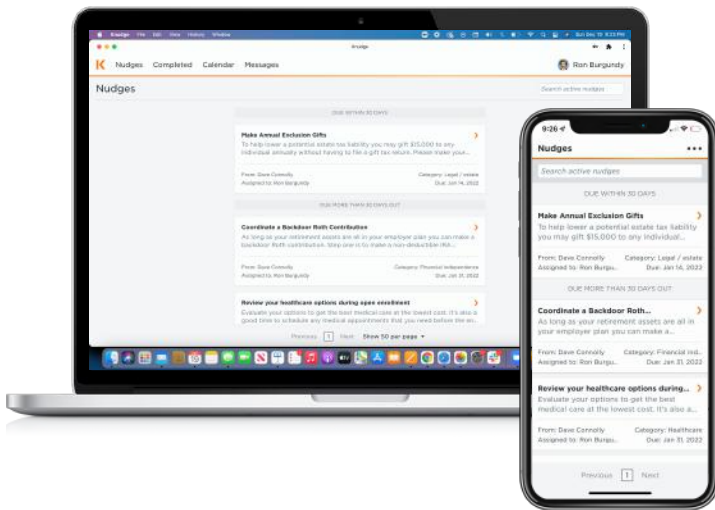


Knudge

Helps busy people take action

**Our lives are busier than ever.
Things we know we should do, sometimes don't get done.**



Knudge helps advisors stay organized and keep track of tasks and completed work related to their clients.

Knudge also helps clients implement agreed upon action items.

Advisors can enter tasks and recommendations (we call them nudges) that are discussed in meetings or that just come up during the course of the year and Knudge sends reminders as they near their due dates.

You don't need to register or log in to receive reminders.

Knudge will send the reminders via email and/or text message and you can engage with the individual action items as if you were logged in. You can view the details, mark it complete, specify another time to be reminded or silence additional reminders if you'd like.

If you have any questions about a specific task, you can simply reply to the email or use the in app messaging to respond. The nice thing about Knudge is all communications about an action item will stay associated with that action item in the messages tab so you don't have to dig through old emails to see any back and forth about a particular task.

If you decide to register you'll also be able to:

- › View your ongoing shared to-do-list.
- › Set preferences for when and how you'd like to receive communications.
- › Access to a calendar view that shows when different tasks are due.
- › And see a record of all previously completed tasks.

As an unregistered or logged out user, you can receive reminders via email

- › Reply to the email if you have any follow up questions or comments. Your reply will be sent back to your advisor and post the message to the nudge.
- › Click “Mark complete” in the email to let your advisor now when something is done or click on the nudge title to see the details and any messages back and forth.
- › You can also click on “Silence additional reminders or schedule a specific time to be reminded” to adjust the scheduling of the reminders (image 1). When viewing the nudge you can also access this interface by clicking on the “Actions” menu in the bottom right corner of the nudge details (image 2).

Remind me

Scheduling mode: Date and time:

Automatic scheduling gets smarter over time as you use Knudge. You can explicitly schedule reminder times on your own instead, though, or suppress them. While a nudge is snoozed, no reminders will be sent (not even manually from the sender's side), but you can still receive new messages.

Your next notification is scheduled for Dec 28, 11:00 AM.

PRESTIGE WORLDWIDE Log in

Make Annual Exclusion Gifts

Details Messages

From: Dave Connolly
To: Ron Burgundy
Category: Legal / estate
Status: Upcoming
Next reminder: Dec 28, 11:00 AM
Due date: Jan 14, 2022

To help lower a potential estate tax liability you may gift \$15,000 to any individual annually without having to file a gift tax return. Please make your annual gifts to your family members.

[Show disclosures](#)

Remind me...
 Archived
 Completed

Actions ▾

Your advisor may also invite you to receive communications via text notification

- › Click on the link in the text notification (image 1) to see the nudge details in your default web browser (image 2) where you can mark the nudge complete or click on “Remind me” in the “Actions” menu (image 3) to silence additional reminders or schedule a reminder at a specific day and time
- › You can click on the messages tab (image 4) to see any previous correspondences about this particular nudge or to send a message to your advisor.

PW
Prestige

Wednesday 5:12 PM

New nudge: Make Annual Exclusion Gifts
From: Dave Connolly
Due: Jan 14, 2022
<https://knud.ge/dabrJ3NzP2GVSNPn9Een>

To help lower a potential estate tax liability...

Thursday 10:28 AM

New nudge: Please schedule your next...
From: Dave Connolly
Due: Feb 28, 2022
<https://knud.ge/QOLZO46bGkKPKeskNEkW>

Please use the link below to schedule our...

PRESTIGE WORLDWIDE Log in

Make Annual Exclusion Gifts

Details Messages

From: Dave Connolly
To: Ron Burgundy
Category: Legal / estate
Status: Upcoming
Next reminder: Dec 28, 11:00 AM
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Actions ▾

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Remind me...
 Archived
 Completed

Actions ▾

PRESTIGE WORLDWIDE Log in

Make Annual Exclusion Gifts

Details Messages

DEC 15

Nudge posted

Ron Burgundy 5:16 PM
Just a quick reply via email

YESTERDAY

Ron Burgundy 11:07 PM
And another question from the app

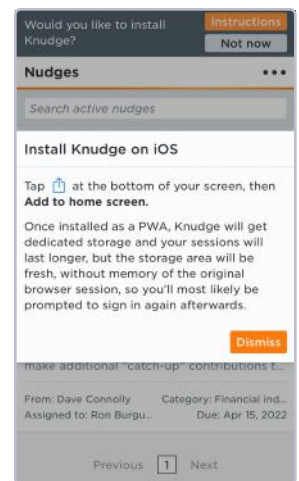
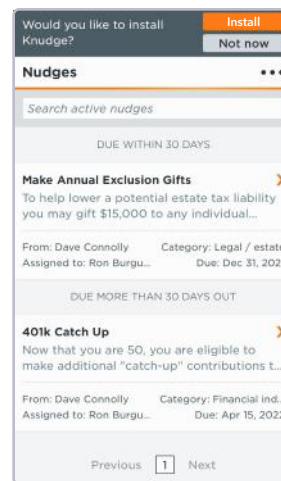
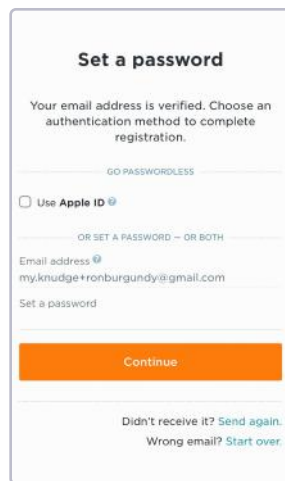
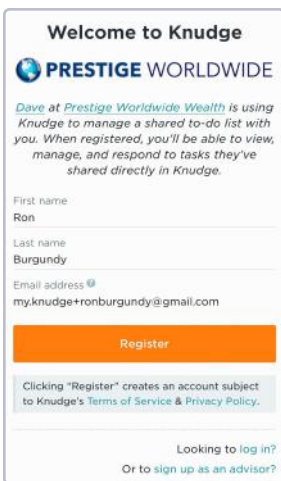
TODAY

Dave Connolly 9:14 AM
And an answer to your questions from your advisor

Send a new message

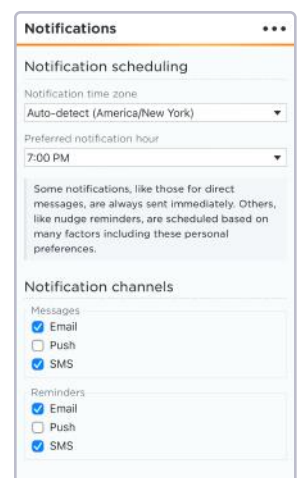
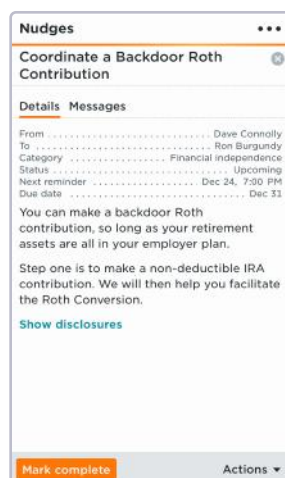
You can also elect to register for Knudge and optionally install the Knudge app on your mobile device

- › Your advisor may invite you to register for Knudge. If they do, you'll receive an email with a brief overview and the option to "Access your account".
- › Clicking "Access your account" will bring you to a registration page with your contact info filled out (image 1). After you click "Register" you'll have the option of creating a password or using your phone or computer's platform credentials to continue (image 2).
- › After registering, or after first logging in on your mobile device, you may be prompted to install the Knudge app (image 3). On most devices, including android clicking "Install" will initiate the install. On iPhones or iPads you'll need to be on Safari to see the prompt and it will instead say "Instructions" which will show you how to save the app to your home screen to complete the install (image 4).



Registered users can see a shared list of all their assigned action items

- › You can login on a web browser or the installed app and see a shared list of all your action items (image 1).
- › If any nudge has a new message it will be surfaced at the top of the list. You can click on any item to view the details (image 2). As you mark things complete, they'll move over to the completed list, which will become an archive of everything you and your advisor have worked on together.
- › You'll also have access to a calendar view (image 3) and be able to set your notification preference for when and how you receive communications (image 4)



A note about your data

Knudge does not – and never will – do anything gross with your data. There are no ad network trackers in this app, not even the kind that masquerades as an analytics script. The only cookie we set is local, secure, and used for session management (i.e., authenticating access).

Our privacy policy is meant for human beings to read – so please feel free to do so!

If your advisor is using Knudge, you should know that you're in good hands.

Your advisor is clearly focused on helping you to take action on the things in your life that they feel are in your best interest to take action on.

Our job is to provide value for both you and your advisor. Knudge isn't a productivity tool, it's an efficacy tool. We take care of task tracking and reminders to help good advisors become more effective at serving you, but we also aim to increase meaningful communication and the visibility of work.

Hopefully Knudge will help optimize for better outcomes and allow you and your advisor to use your time together to have deeper strategic conversations.

Thank you for taking the time to learn a bit more about Knudge. We hope you'll find it to be intuitive and helpful.

As a client, you won't be paying anything to use Knudge, but from our perspective, you're a Knudge customer just as much as your advisors are. The quality of your experience is a key part of the idea. Your questions, feedback, and suggestions are very welcome!

You can reach us at support@knudge.com.

