ROBOTRADER QUICKSTART GUIDE
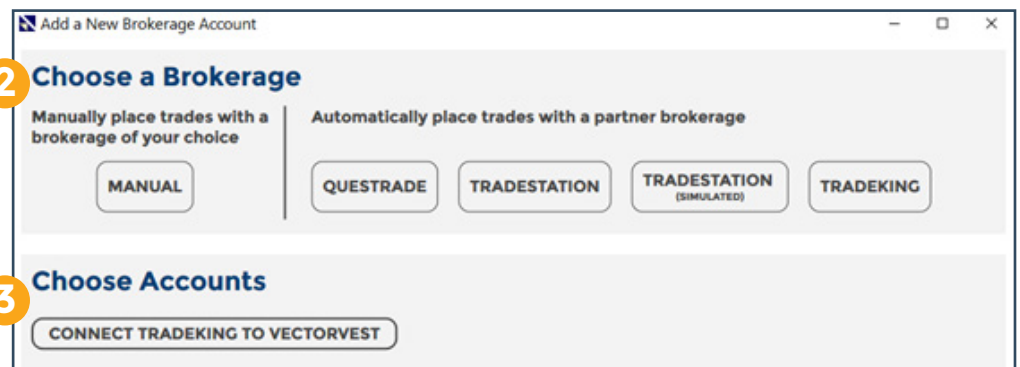
Connecting Your Account

1. Select "Add New Account" on the RoboTrader tab.

2. Choose your brokerage.

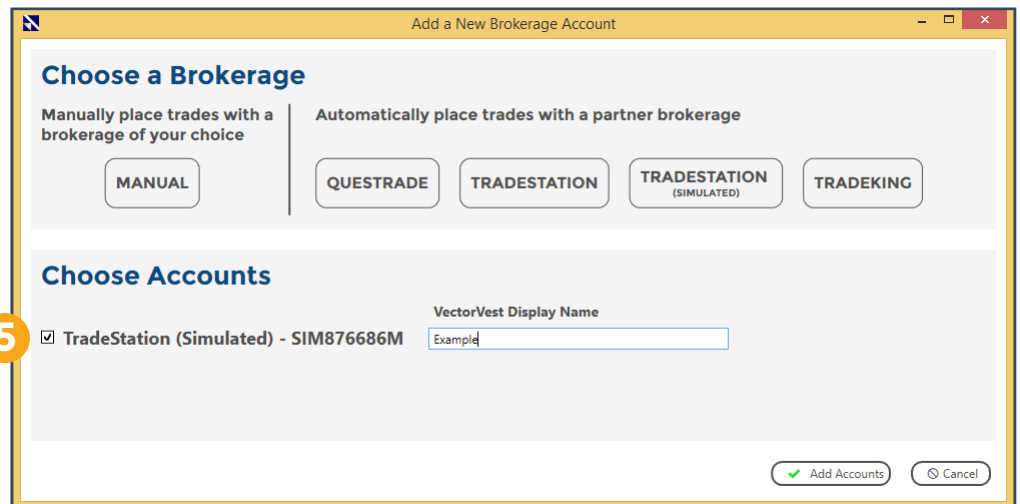3. Click "Connect [Your Broker] to VectorVest".

   NOTE: RoboTrader currently connects with TradeStation or TradeKing for streamlined trade execution and automatic portfolio syncing.

4. If you have an existing account, click 'Link VectorVest to…' and sign in with your brokerage account username and password, or use 'Open a new account' for an application *(not shown)*.
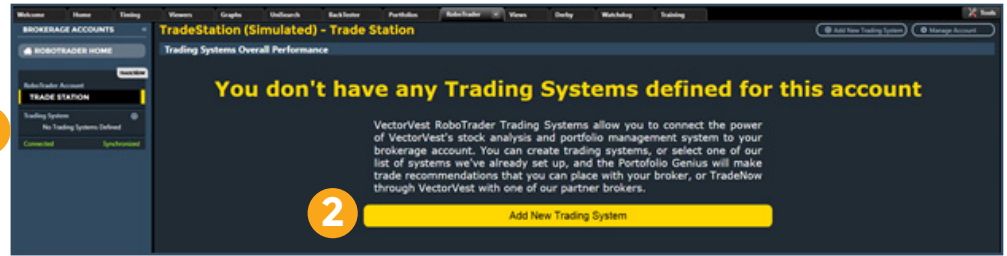
5. Your account will now be listed. Choose a display name [optional] and click 'Add Account.'

ROBOTRADER HOME

RoboTrader represents the next step in the evolution of the VectorVest suite of investing tools. It allows you to connect the power of VectorVest's stock analysis and portfolio management system directly to your brokerage account. RoboTrader brings TradeNow technology to Portfolio Genius enabling a whole new level of trading ease and accuracy. Eliminate emotion from your trading. Save time and improve your bottom line.

Quick Start Video   Add New Account

Add a New Brokerage Account

Choose a Brokerage

Manually place trades with a brokerage of your choice

Automatically place trades with a partner brokerage

MANUAL   QUESTRADE   TRADESTATION   TRADESTATION (SIMULATED)   TRADEKING

Choose Accounts

CONNECT TRADEKING TO VECTORVEST

Add a New Brokerage Account

Choose a Brokerage

Manually place trades with a brokerage of your choice

Automatically place trades with a partner brokerage

MANUAL   QUESTRADE   TRADESTATION   TRADESTATION (SIMULATED)   TRADEKING

Choose Accounts

☑ TradeStation (Simulated) - SIM876686M

VectorVest Display Name

Example

✔ Add Accounts   ⊘ Cancel
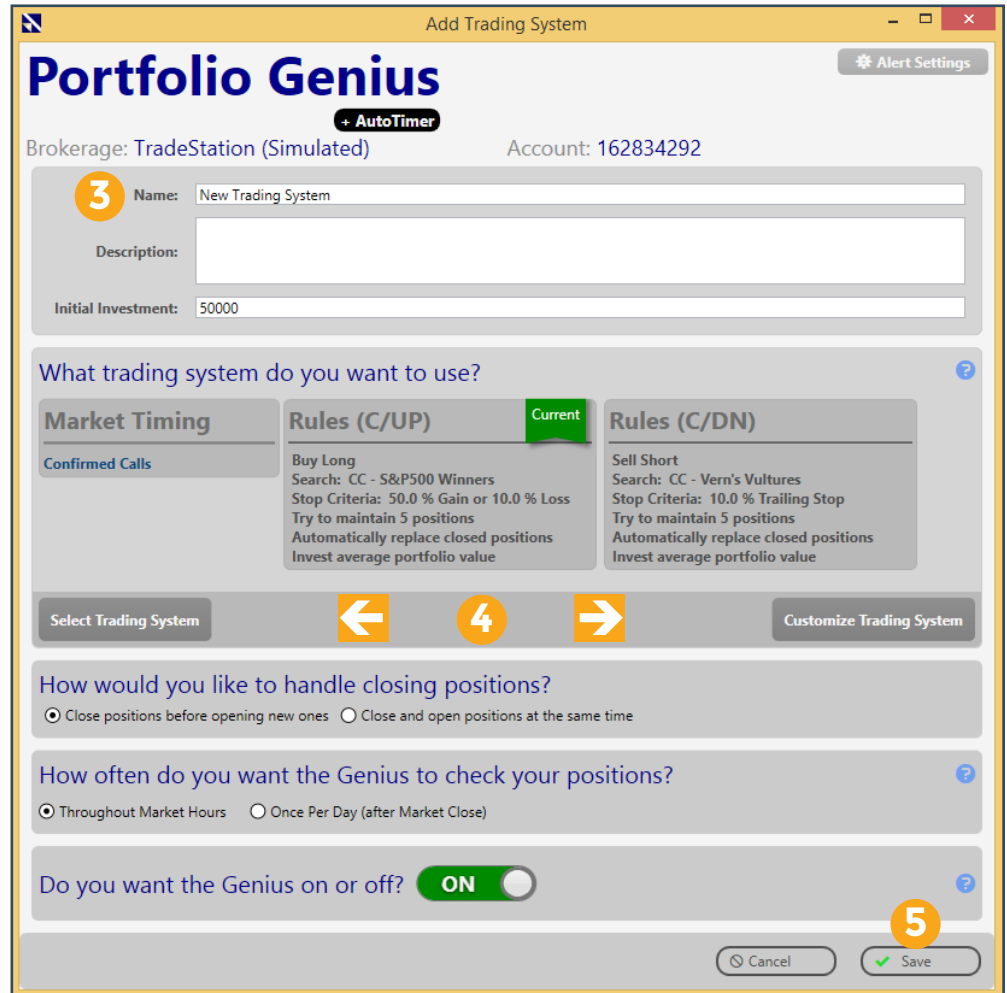
Adding Trading Systems to RoboTrader

1. Select your account.

2. Click 'Add New Trading System.'

3. Set the name and your preferred investment amount.

4. Choose or create your trading system:

   a. 'Select an Existing Trading System' allows you to choose any VectorVest preset system or one of your own existing trading systems.

      Click 'Select' when finished.

   b. 'Build a Custom Trading System' lets you build your own system from the ground up, select any stock scan in UniSearch, along with a timing system, stop-loss, profit target, and a variety of risk management options.
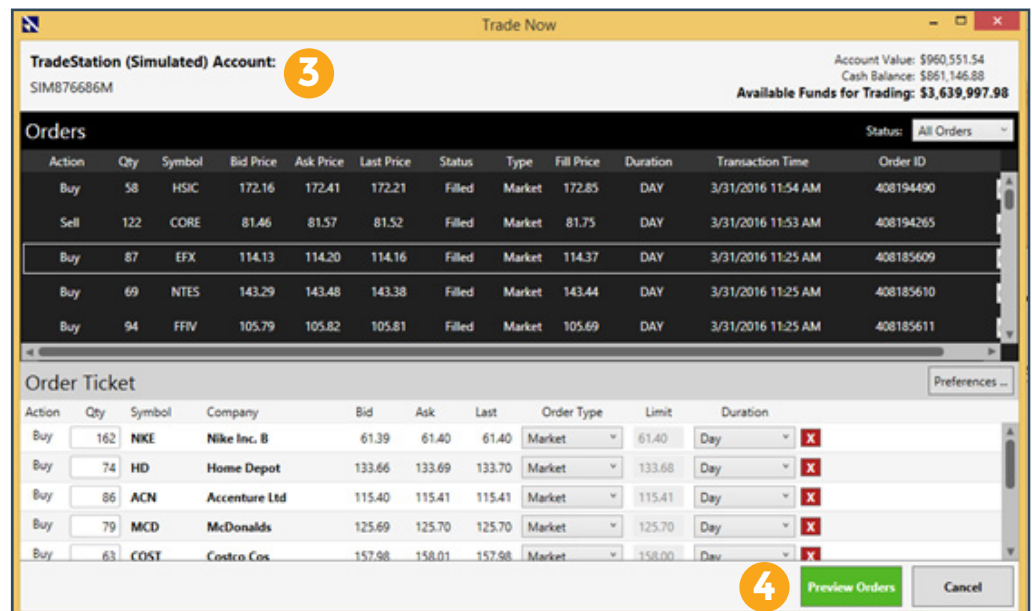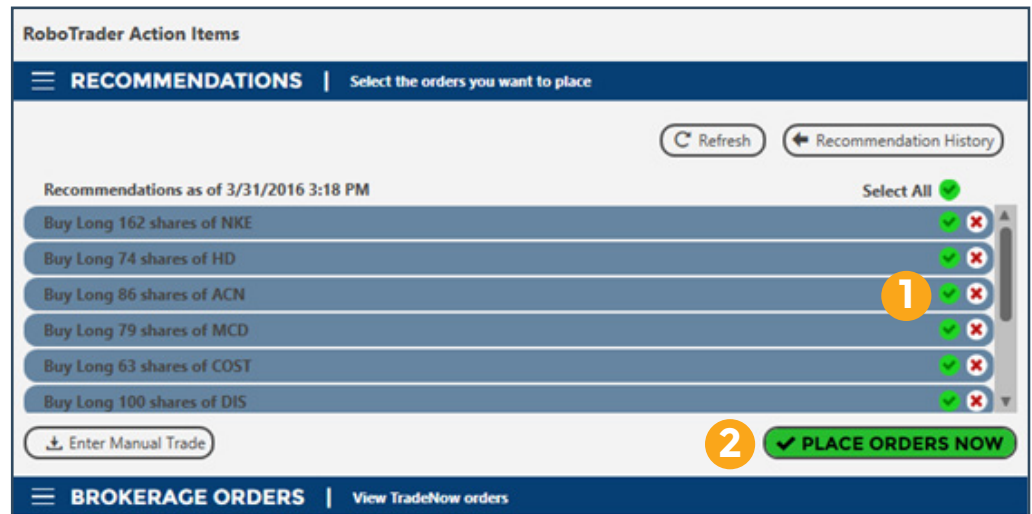
5. Review the default selections, and click 'Save' if everything looks good!

RoboTrader will start showing your trading recommendations immediately, based on the system you selected.

Executing Recommendations with RoboTrader

1. Click the check mark icon to the right of any trade you would like to execute, or use the 'x' icon to remove the trade.

2. Once the trades you want are selected, click 'Place Orders Now' to generate an order ticket (you must have a *connected* broker account).

3. Review the trade details in the order ticket, and make any modifications you wish.

4. Click 'Preview Orders' to review your final selections.

5. Click 'Place Orders' on the next screen to transmit them to your broker *(not shown)*.

RoboTrader Action Items

RECOMMENDATIONS | Select the orders you want to place

C Refresh ← Recommendation History

Recommendations as of 3/31/2016 3:18 PM   Select All ✓

Buy Long 162 shares of NKE	✓ ✗
Buy Long 74 shares of HD	✓ ✗
Buy Long 86 shares of ACN	① ✓ ✗
Buy Long 79 shares of MCD	✓ ✗
Buy Long 63 shares of COST	✓ ✗
Buy Long 100 shares of DIS	✓ ✗

⬇ Enter Manual Trade   ② ✓ PLACE ORDERS NOW

BROKERAGE ORDERS | View TradeNow orders

Trade Now

TradeStation (Simulated) Account: ③   Account Value: $960,551.54
SIM876686M   Cash Balance: $861,146.88
                                        Available Funds for Trading: $3,639,997.98

Orders   Status: All Orders

Action	Qty	Symbol	Bid Price	Ask Price	Last Price	Status	Type	Fill Price	Duration	Transaction Time	Order ID
Buy	58	HSIC	172.16	172.41	172.21	Filled	Market	172.85	DAY	3/31/2016 11:54 AM	408194490
Sell	122	CORE	81.46	81.57	81.52	Filled	Market	81.75	DAY	3/31/2016 11:53 AM	408194265
Buy	87	EFX	114.13	114.20	114.16	Filled	Market	114.37	DAY	3/31/2016 11:25 AM	408185609
Buy	69	NTES	143.29	143.48	143.38	Filled	Market	143.44	DAY	3/31/2016 11:25 AM	408185610
Buy	94	FFIV	105.79	105.82	105.81	Filled	Market	105.69	DAY	3/31/2016 11:25 AM	408185611

Order Ticket   Preferences ...

Action	Qty	Symbol	Company	Bid	Ask	Last	Order Type	Limit	Duration	
Buy	162	NKE	Nike Inc. B	61.39	61.40	61.40	Market	61.40	Day	✗
Buy	74	HD	Home Depot	133.66	133.69	133.70	Market	133.68	Day	✗
Buy	86	ACN	Accenture Ltd	115.40	115.41	115.41	Market	115.41	Day	✗
Buy	79	MCD	McDonalds	125.69	125.70	125.70	Market	125.70	Day	✗
Buy	63	COST	Costco Cos	157.98	158.01	157.98	Market	158.00	Day	✗

④ Preview Orders   Cancel

Setting Up RoboTrader Alerts (Email & Text)

1. Click on the 'Tools' button in the upper right corner of the VectorVest program.

2. Select 'Application Settings.'

3. Click the 'Alerts' tab.

4. Click on one of the blank lines under the 'Destination' column.

5. Click 'Edit'.

6. Use the drop down to select email or SMS/Text.

7. Complete the information and click 'Save.' Repeat from step 4, to add others.

8. Check the selection boxes under RoboTrader and/or RoboTrader Recommendations.

9. Click 'OK' to close the Application Settings Window.