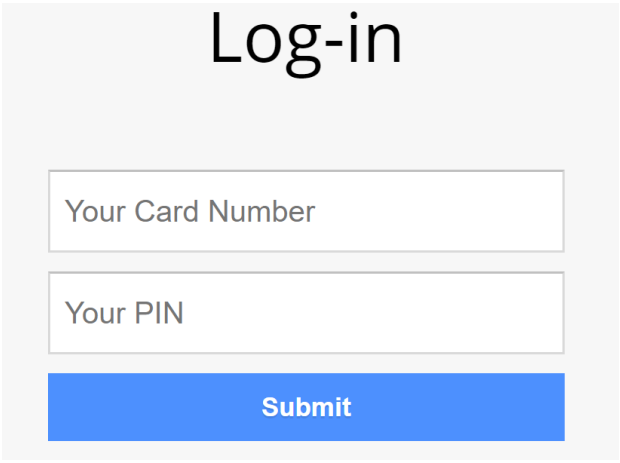
WEISS FINANCIAL RATINGS

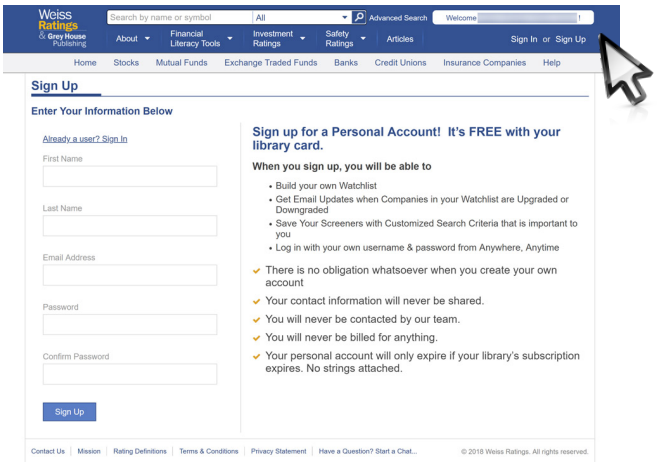
INVESTMENTS • BANKING • INSURANCE
MEDIGAP • FINANCIAL LITERACY

How to Guide

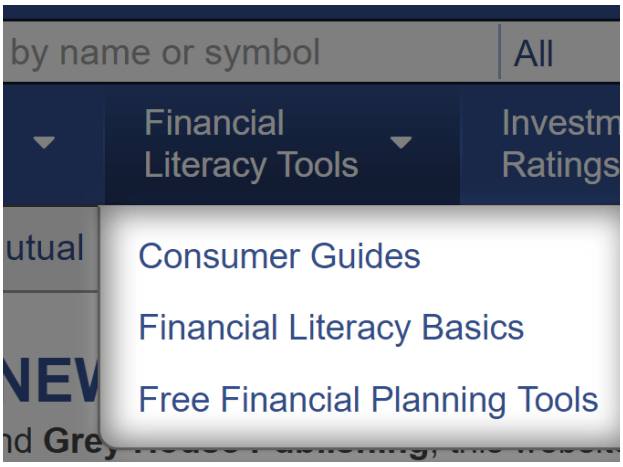


ACCESSING & CREATING AN ACCOUNT

Go to catalog.ncls.org and click on the **Weiss Financial Ratings button** in the right side column. On the page that opens, **enter your library card number and pin** and **click the login button** to continue.



Optional step: create an account in order to save information across multiple sessions. To create an account, **click sign up** in the top-right corner. Enter your name, email, and a password, and **click the Sign Up button**.

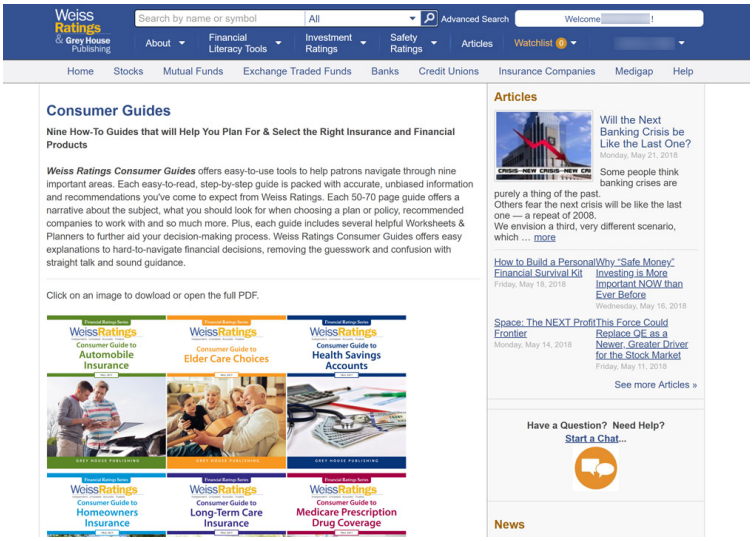


FINANCIAL LITERACY TOOLS

Our subscription includes:

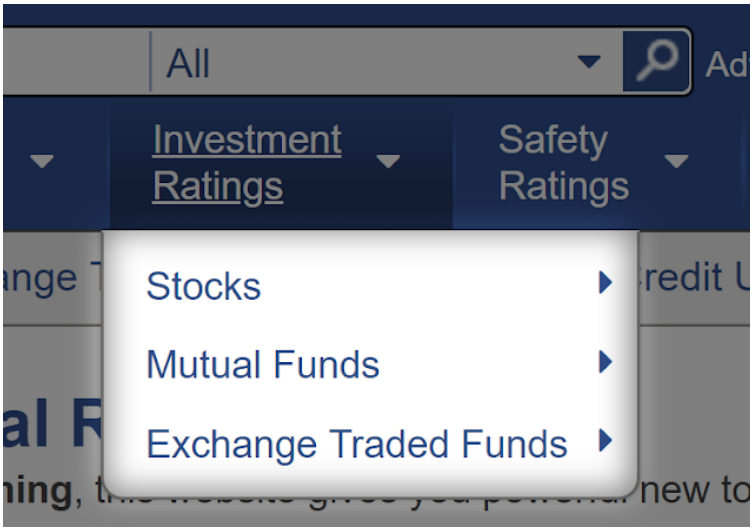
- Consumer guides
- Financial literacy basics
- Financial literacy: planning for the future
- Financial literacy: how to become an investor
- Free financial planning tools

FUN FACT: YOU CAN USE WEISS TO COMPARE AUTO INSURANCE COMPANY RATINGS.



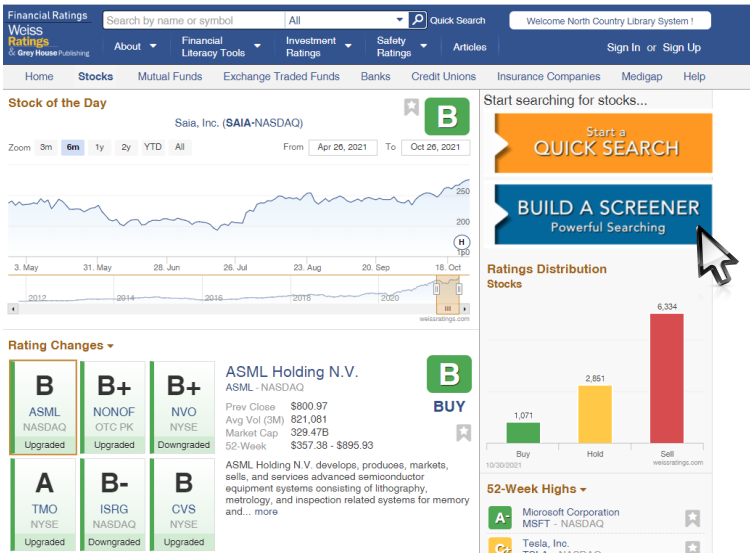
Explore Consumer Guides and Financial Literacy Basics to view pdf guides on various topics.

Once open, you will also have the option to download or print the guide for future reference.



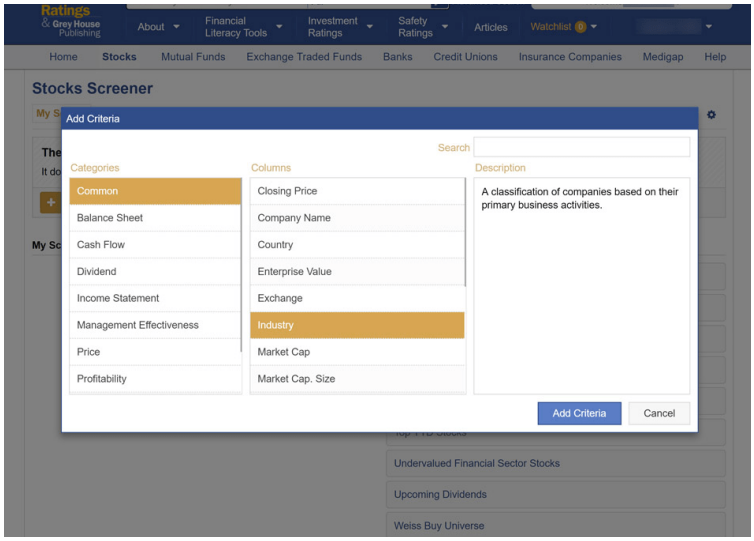
INVESTMENT RATINGS

This resource offers information and ratings for Stocks, Mutual Funds, and Exchange Traded Funds (ETFs). To begin, **click the Investment Ratings dropdown menu** and **select your area of interest.**



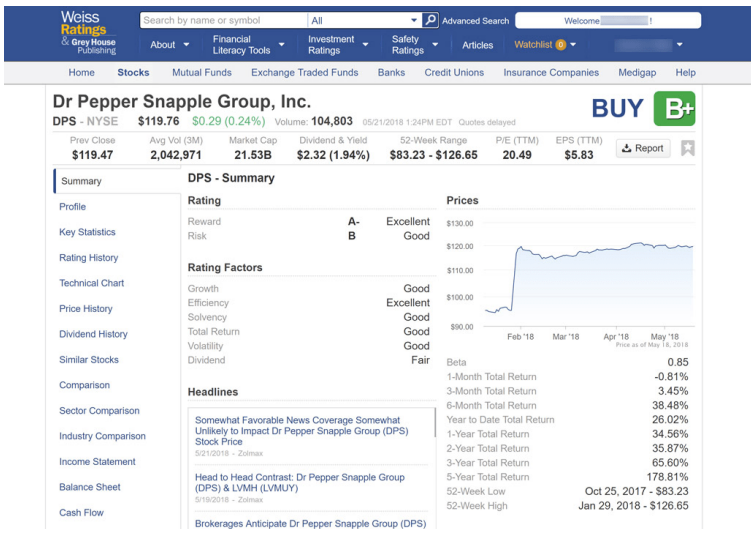
As an example, we will explore stocks. The main page for the stocks option will open, displaying a stock of the day, recent rating changes, and ratings distribution. To find a stock that meets your needs, **click the Build a Screener button.**

FUN FACT: USE THE SEARCH BAR AT THE VERY TOP OF THE SCREEN TO LOOK FOR A SPECIFIC COMPANY



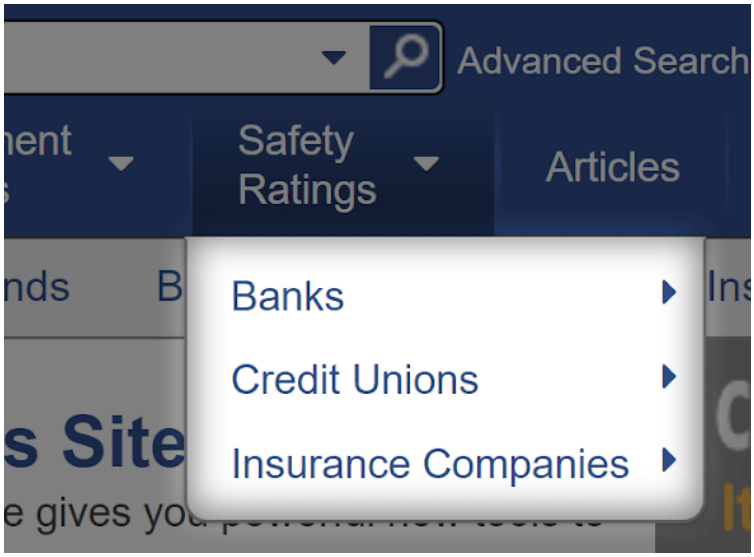
Within the Screener tool, you can **select from the list of common screens,** which are made from popular criteria combinations, or **click the +Add Criteria button** to make a custom screen.

When creating a custom screen, **select a category, select a criteria** in the columns section, and then **click Add Criteria**.



After clicking on a stock, you'll first see a summary page of the stock with some basic information. For more detailed information and advanced analysis, **click a link** on the left-side column.

For a printable version of the information, **click the Report button**. A one-page PDF will be generated and downloaded. If you are signed in and want to keep up-to-date on the selected stock, **click the star banner icon** next to the Report button to add it to your Watchlist.

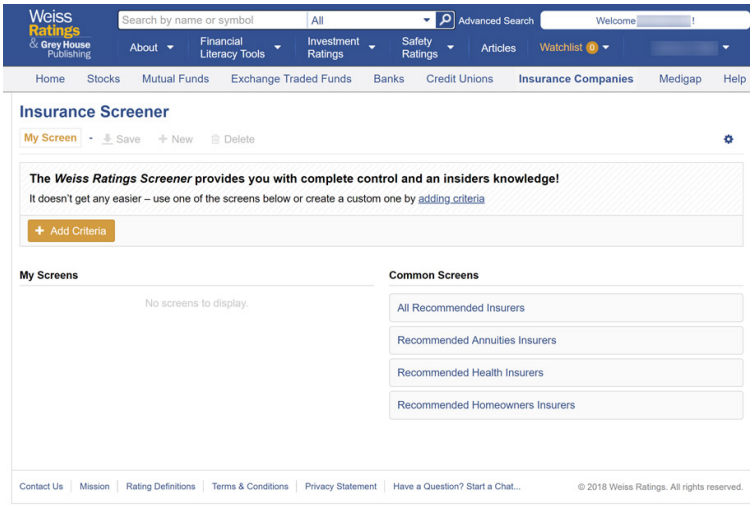


SAFETY RATINGS

Weiss Financial Ratings Series offers safety information on banks, credit unions, and insurance companies. To begin, click the Safety Ratings dropdown menu and **select Banks, Credit Unions, or Insurance Companies**.

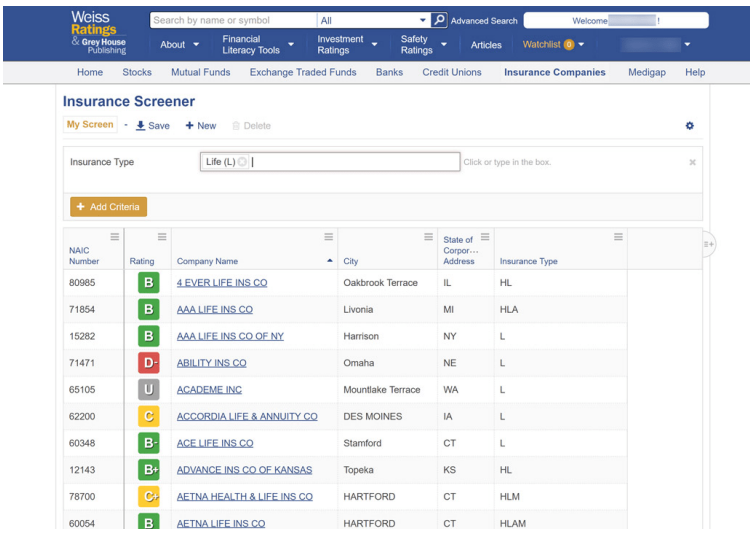
The main page highlights a bank, credit union, or insurer of the day. To find a company or insurer to meet your needs, **click the Build a Screener button** to the right.

FUN FACT: YOU CAN ADD BANKS, STOCKS, MUTUAL FUNDS, ETC TO YOUR WATCHLIST TO RECEIVE UPDATES ON THEM.

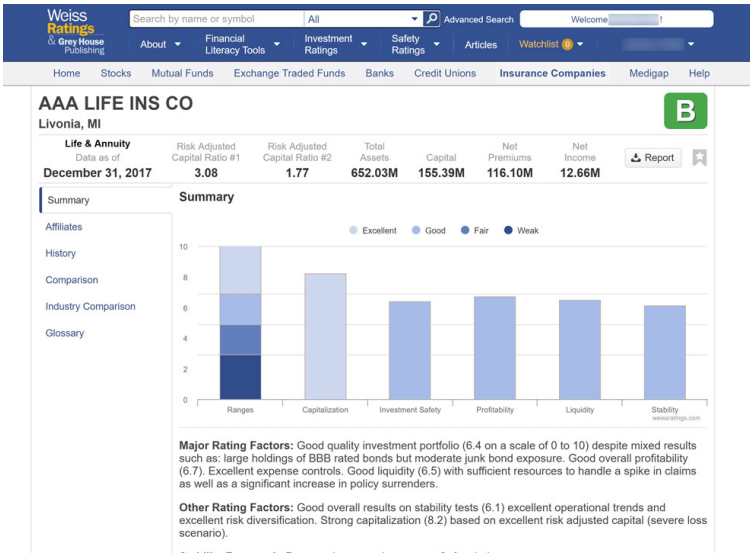


Within the Screener tool, you can **select from the list of common screens**, which are made from popular criteria combinations, or **click the +Add Criteria button** to make a custom screen.

When creating a custom screen, **select a category, select a criteria** in the columns section, and then **click Add Criteria**.



The selected criteria will appear at the top of the page. **Select or adjust the criteria** to filter the list of companies or insurers below. If you are signed in and would like to use the same screen criteria at a later time, **click Save**. Your custom screen will be available the next time you open the screener. **Click a company name** to see more details.



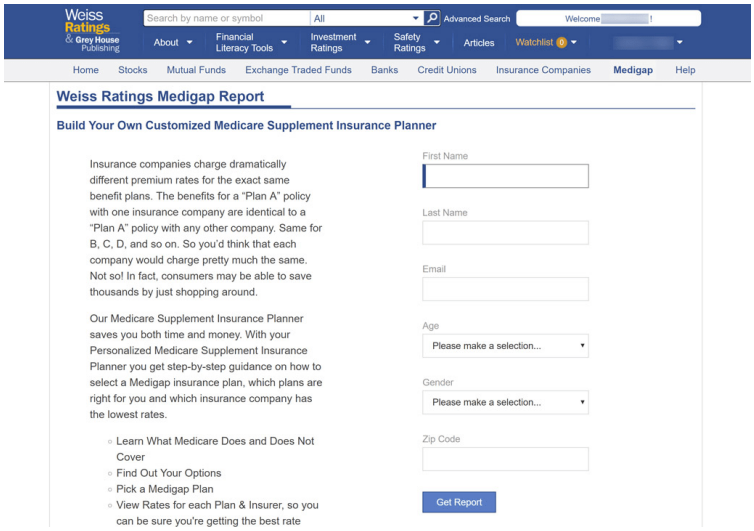
You'll first see a summary page of the company or insurer with some basic information. For more detailed information and advanced analysis, **click a link** in the left-side column.

For a printable version of the information, **click the Report button**. A one-page PDF will be generated and downloaded. If you are signed in and want to keep up-to-date on the selected company, **click the star banner icon** next to the Report button to add it to your Watchlist.

FUN FACT: CLICK THE HELP BUTTON ON THE MENU BAR FOR A LIST OF HANDY TUTORIALS.

MEDIGAP

When it comes time to select a Medicare Supplement Insurance provider at the age of 65, you might be surprised by the dramatic range of premium rates—for the same plan—from different insurance companies. The Medigap tool prepares a personalized insurance planner so you can choose the insurance company that's right for you. To begin, click Medigap in the submenu bar.



There are 2 options for providing in your information to create a Medigap report.

Option 1: Use your personal information to fill in the form. By entering your email, you'll get a copy of the report sent to your inbox.

Option 2: If you do not want to use your personal information, just enter your initials in the name fields and enter ignore@greyhouse.com as your email. Next, **select your age and gender, enter your zip code**, and **click the Get Report button**.

Your customized report will automatically generate. **Click the View Report button** and a PDF copy will either download or open in your web browser.

If it opens in the web browser, **click the Print icon** in the top-right corner to print a copy or **click the download icon** to save a copy to your computer.

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