

Quick Start Card

Home Screen Dashboard

The screenshot shows the RBsource Home Screen Dashboard with several callout boxes highlighting key features:

- CONTENT CATEGORIES:** Click to Browse or search securities content. This points to the navigation tabs: Acts, General Rules & Regs, and Forms & Schedules.
- REG REVIEW FORMS & SCHEDULES:** Access all Forms with interactive checklists for RegReview subscribers only. This points to the 'New RegReview Forms & Schedules' section, which lists various forms like Form 10-K, Form 10-Q, Form 20-F, Form 40-F, Form 8-K, Form F-1, Form F-3, Form F-4, Form N-1A, Form S-1, Form S-3, Form S-4, Schedule 13D, Schedule 13G, and Schedule 14A.
- CITATION SEARCH:** Locate documents by citation. This points to the 'Citation Search' button in the top right.
- DOCUMENT TYPES:** Browse or search content by Document Type. This points to the 'Document Types' sidebar on the right, which lists categories like Statutes, Regulations, Forms & Schedules, Staff Legal Bulletins, Industry Guides, etc.
- TOPICS:** Browse or search content by Topic. This points to the 'Topics' sidebar on the right, which lists categories like Accounting and Auditing, Broker-Dealers, Corporate Finance, etc.
- NEW & UPDATED CONTENT:** Update notifications on newly added material. This points to the 'New & Updated Content' section in the center, which lists recent updates such as 'Securities Act of 1933 - Regulation A - Rule 257' and 'Regulation S-T - Rule 10'.
- RED BOX DOWNLOAD:** Download materials from the Red Box. This points to the 'Red Box' section at the bottom left, which features a red box icon and a 'Download for offline reading' option.

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Search Results Dashboard

RECORD KEEPING OPTIONS
Select documents to add (Worklist or Favorites), Print, Download, or Email

CREATE ALERT
Receive notifications when new documents match your search

SAVE SEARCH
Save search to run again later

VIEW
Set results to view up to 100 items per page

SEARCH WITHIN
Refine results with additional terms

FILTERS
Refine results with post-search filters

RESET/APPLY
Apply or remove selected filters

NEXT/PREVIOUS
Advance/Return through results list

SORT BY
Arrange search results by relevance or document type

The screenshot shows the Wolters Kluwer search results interface. At the top, there's a navigation bar with 'Home' and 'Search Results'. A search bar contains 'accredited investor'. To the right of the search bar are buttons for 'Create alert', 'Save search', and 'Citation Search'. Below the search bar is a 'Post Search Filters' sidebar with a 'Search & Filter' section containing 'institutional' and a 'Search' button. The 'Available Filters' section lists document types like 'Primary Law', 'Statutes', 'Rules & Regulations', etc. At the bottom of the sidebar are 'Reset' and 'Apply' buttons. The main content area displays search results, including 'Amending the "Accredited Investor" Definition' and 'Revisions of Limited Offering Exemptions'. A 'Sort by' dropdown is set to 'Relevance', and a 'View' dropdown is set to '20'. Navigation arrows for 'Next/Previous' are visible at the bottom right of the results list.

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Document View

The screenshot shows the RBsource Document View interface for a document titled "Rule 497. Filing of Investment Company Prospectuses—Number of Copies." The interface includes a top navigation bar with "Home", "REGULATION C - REGISTRATION, Regulation C, Rule 497. Filing of Investment Company Prospectuses—Number of Copies.", and "RBsource®". A secondary navigation bar contains "Favorite", "Worklist", "Alert", "Print", "Download", and "Email". A "RegReview Point-in-Time Analysis" banner indicates changes since January 2013. The main content area displays the text of Rule 497, with callouts for "VIEW RELATED" content. A left sidebar contains icons for "Compare", "Info", "Table of Contents", "Search", "Notes & Highlights", and "Editorial Notes".

FAVORITE
Bookmark document for easy retrieval

ALERT
Receive notifications when document is updated

SAVED ITEMS
Access saved Favorites, Worklists, Notes & Highlights, Alert Messages and Saved Searches

REG REVIEW
Access Point-in-Time Analysis for document changes since January 15, 2013. Available to RegReview subscribers only.

COMPARE
View current and/or future text of Laws, Regs and Forms, or compare selected filings.

INFORMATION
See relevant metadata

TABLE OF CONTENTS
Browse through content in publication order

SEARCH
Find terms within document

NOTES & HIGHLIGHTS
View, edit and delete notes and highlights

EDITORIAL NOTES
View editorially created notes relevant to the document

VIEW RELATED
Access selected content related to the current document