



# Client Portal



Menu Choices



Dean and Elizabeth Martin

User Settings

- Portfolio
- Documents
- Updates
- Overview
- Performance
- Holdings
- Activity
- Logout

- ALL ACCOUNTS
- GROWTH
- Elizabeth Martin, Individual  
SAMPLE-465 \$1,627,291.98
  - HIGHLY AGGRESSIVE
  - Dean and Elizabeth Martin, Joint  
SAMPLE-405 \$681,237.20
  - UNMANAGED ACCOUNTS
  - Dean Martin, Roth  
SAMPLE-460 \$166,204.22

## Overview

As Of 03/23/2015

VALUE ON 3/23/15

\$2,308,529 As of Value

Account Asset Category Asset Class

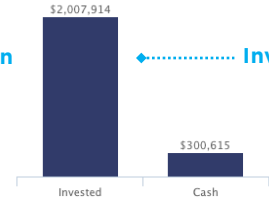
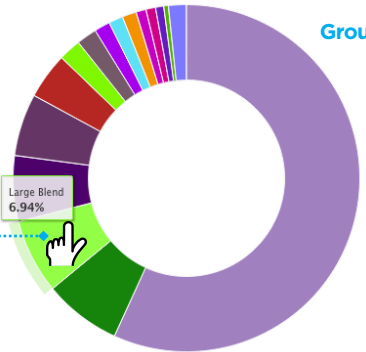
Print Screen

Grouping Options

Invested vs. Cash

Account Information

Interactive, On-Screen Data



YOUR ADVISOR



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- TWM OneView

Link To OneView

Advisor Information

Holding	Market Value	Shares	Percent
Common Stock	\$1,311,842.41	--	56.83 %
Money Market- Tax-Free	\$166,376.38	--	7.21 %
Large Blend	\$160,276.05	--	6.94 %
Europe Stock	\$141,457.26	--	6.13 %

No guarantee of future performance can be made because of past performance, and no information in this website is verified as completely accurate, though it is deemed to be reliable.

