



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

Account Information

Overview

As Of 03/23/2015

VALUE ON 3/23/15

\$2,308,529 As of Value

Account

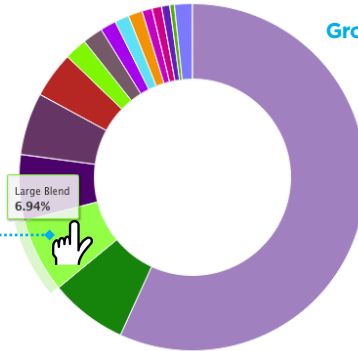
Asset Category

Asset Class

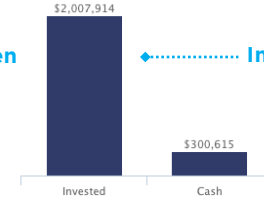
Grouping Options

Print Screen

Invested vs. Cash



Interactive, On-Screen Data



YOUR ADVISOR



BRUCE THOMPSON

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TWM OneView

Link To OneView

Advisor Information

Holding

- Common Stock
- Money Market- Tax-Free
- Large Blend
- Europe Stock

Market Value

\$1,311,842.41
 \$166,376.38
 \$160,276.05
 \$141,457.26

Shares

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Percent

56.83 %
 7.21 %
 6.94 %
 6.13 %

