

TWM Website Gateway

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Fidelity Institutional
 Straight thru trade processing & reconciliation | modeling, tax driven portfolio rebalancing, portfolio analytics

ORION Portfolio Engine

Digital Portfolio View

Fidelity and Held Away Accounts - daily performance and 3rd party reconciliation
Manually Posted Assets - monthly performance and reconciliation

View Performance, Activity, Holdings & Account Analytics
 Updated daily - by portfolio, account, asset class or category, management style (ESOPs, etc.)

TWM Quarterly and On Demand Statements | Document Vault
 Delivered electronically or snail mail

Mobile Phone App

Monthly Commentary & Other Updates
 For your eyes only!

Client Link to OneView
 Located under TWM address

Daily data pull

TWM OneView

Financial Plan Engine

Assets & Liabilities, Income & Expenses, Insurance, Estate -- keep planning data current

Aggregation - Checking, Loans, Credit Card Account Balances

Link to Interactive Financial Plan - are you on track?

Spending Tracker, Budget Tool, Financial Organizer

Planning Reports run by TWM -- Balance Sheet, Estate Plan flow chart, Insurance, etc.

Document Vault

Mobile Phone App

