

HELP PANEL

- MyAdvisor
- Messages
- Add Accounts

clients can scan and upload important doc's such as data gathering info, wills, insurance policies - into a encrypted very secure server.

all doc's that we send out will be archived in the report section.

- HOME
- MY PROFILE
- MY DOCUMENTS
- REPORTS
- RESEARCH

- Overview
- Banking
- Investments
- Insurance
- Real Estate
- Personal Assets
- Liabilities

MESSAGES

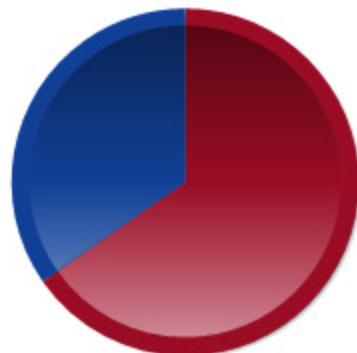
You have 1 New Message(s)

welcome to the new portal

Test
7/21/2010 12:32:00 PM

clients will be alerted to important messages via an email that instructs them to visit their webpage

INVESTMENT ALLOCATION



Small Cap : 65.3% Large Cap : 34.7%

MARKET UPDATE



Thursday, July 22, 2010

DOW	10344.17 ▲	223.64	(2.21 %)
NASDAQ	2244.28 ▲	56.95	(2.6 %)
S&P 500	1095.26 ▲	25.67	(2.4 %)
Russell	841.42 ▲	21.55	(2.63 %)

INVESTMENTS

Online Institution	# A/c	Est. Value
Total	0	\$0.00

Offline Institution	# A/c	Ext. Value
Safe deposit box	2	\$17,002.96
Total	2	\$17,002.96

TOTAL INVESTMENTS 2 \$17,002.96

WEALTH ALLOCATION

Update All Accounts

Assets	Estimated Value
Banking	NA
Investment	\$17,002.96
Insurance(Cash Value)	\$0.00
Real Estate	\$486,000.00
Personal Assets	\$0.00
Total Assets	\$503,002.96
Liabilities	(\$0.00)
TOTAL NETWORK	\$503,002.96

real-time updates of your investments including accounts at TD Ameritrade Institutional, 401k's, etc.

a complete snapshot of your total network with real-time links to bank accounts, insurance, property values (updated by zillow) and other personal assets.

This allows clients to turn a static financial plan into a dynamic plan!