Guidance & Retirement

a

Investment Products

Accounts & Trade

# Goal Performance: Mike's Retirement\*

News & Insights

Grandkid's Education Mike's Wealth Transfer Mike's Retirment

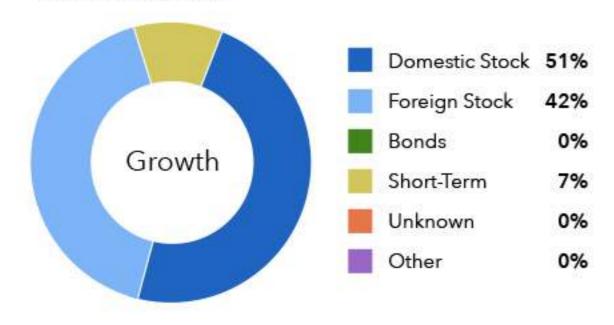
Research

## Your Goal's Total Balance is \$5,963,258.99\* AS OF /08/06/2015

You have 2 Fidelity Private Wealth Management accounts allocated toward this goal.

# Your Goal's Investment Strategy

Your goal's assets are being invested using a Growth With Income investment style, resulting in the following breakdown of current investments:



# Your Goal's Cumulative Performance



See definitions

# Your Goal's Annualized Performance

Download performance data to spreadsheet

AS OF 02/12/2012 - 08/31/2015

✓ Pre-Tax ✓ After-Tax

	1-Month	3-Month	YTD	1-Year	3-Year	5-Year	10-Year	Life
Your PWM Goal Account (Pre-Tax)	+2.2%	-1.5%	+2.7%	+7.5%	+8.2%	+9.0%	+8.0%	+7.9%
PWM CUSTOM BENCHMARKS								
Pre-Tax: Custom Benchmark Name	+0.9%	-1.9%	+2.2%	+6.8%	+9.2%	+6.5%	+7.9%	<del>1</del> .47
HISTORICAL ACCOUNTS (No longer alloc	ated toward t	his goal)						
PWM Account Name Y23123123	+0.9%	-1.9%	+2.2%	+6.8%	+9.2%	+6.5%	+7.9%	5371
PWM Account Name Y32432434	+0.0%	+0.0%	+0.0%	+0.2%	+0.2%	+0.2%	+0.9%	220
ALLOCATED ACCOUNTS								
PWM V2 Growth Y23123123	9.5	153	51571	+6.8%	+9.2%	+6.5%	+7.9%	101
<b>PWM FWMA</b> Y32432434	550	6263	0.0%	+0.2%	+0.2%	+0.2%	+0.9%	241
MARKET INDEX COMPARISONS								
Dow Jones U.S. Total Stock Market Index	+2.2%	-1.5%	+2.7%	+7.5%	+8.2%	+9.0%	+8.0%	232/1
Lipper Tax Exempt MM Fund Index	+0.9%	-1.9%	+2.2%	+6.8%	+9.2%	+6.5%	+7.9%	21.5
Barclays Municipal Bond Index	+0.0%	+0.0%	+0.0%	+0.2%	+0.2%	+0.2%	+0.9%	224

### Add/edit index

<sup>\*</sup> Includes Fidelity Private Wealth Management® accounts only.

PWM Account Summary > PWM Goal Performance Details

# Goal Performance: Mike's Retirement\*

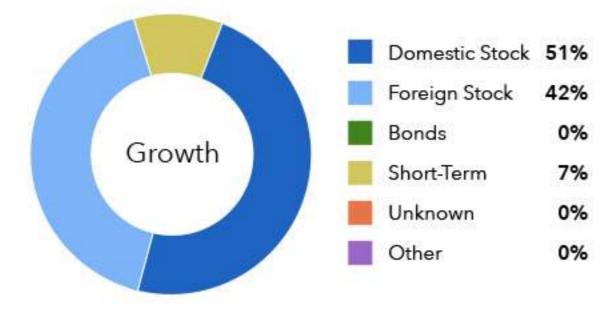
Mike's Retirment Grandkid's Education Mike's Wealth Transfer

# Your Goal's Total Balance is \$5,963,258.99\* AS OF /08/06/2015

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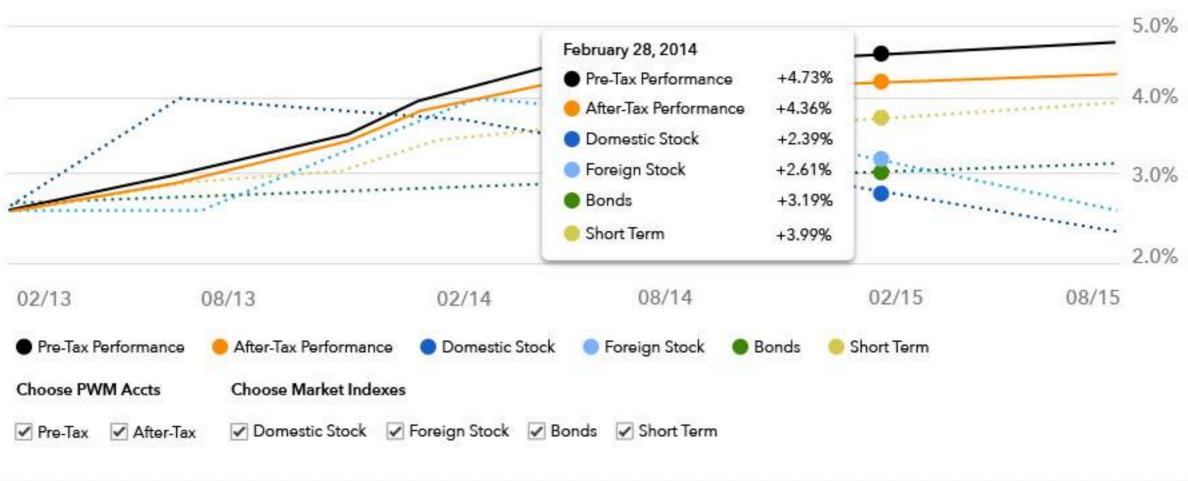
# Your Goal's Investment Strategy

Your goal's assets are being invested using a Growth With Income investment style, resulting in the following breakdown of current investments:



# Your Goal's Cumulative Performance 1-Month | 3-Month | Year-to-Date | 1-Year | 3-Year | Life of Reporting

02/12/2012 - 08/31/2015



# Use the chart on the left to see the total return of your portfolio over time, measuring the overall percentage change in your account.

**Cumulative Performance** 

Market Index Comparisons

# Compare your portfolio's cumulative performance with market indexes representing the various asset classes. Pre and After-Tax Performance

Measure the performance of your account both before and after the impact of taxes. Your after-tax returns take your personal tax

### rates into consideration.

annualized, but rather are cumulative.

Annualized Peformance

See the table below for average annualized performance over different time periods. Returns for less than 1 year are not

Hide definitions

## AS OF 02/12/2012 - 08/31/2015

Your Goal's Annualized Performance

Download performance data to spreadsheet

	1-Month	3-Month	YTD	1-Year	3-Year	5-Year	10-Year	Life
Your PWM Goal Account (Pre-Tax)	+2.2%	-1.5%	+2.7%	+7.5%	+8.2%	+9.0%	+8.0%	+7.9%
PWM CUSTOM BENCHMARKS								
Pre-Tax: Custom Benchmark Name	+0.9%	-1.9%	+2.2%	+6.8%	+9.2%	+6.5%	+7.9%	127.57
HISTORICAL ACCOUNTS (No longer alloc	ated toward	this goal)						
PWM Account Name Y23123123	+0.9%	-1.9%	+2.2%	+6.8%	+9.2%	+6.5%	+7.9%	150
PWM Account Name Y32432434	+0.0%	+0.0%	+0.0%	+0.2%	+0.2%	+0.2%	+0.9%	929
ALLOCATED ACCOUNTS								
PWM V2 Growth Y23123123	5.50	223	222	+6.8%	+9.2%	+6.5%	+7.9%	725
PWM FWMA Y32432434	241	£23	0.0%	+0.2%	+0.2%	+0.2%	+0.9%	**
MARKET INDEX COMPARISONS								
Dow Jones U.S. Total Stock Market Index	+2.2%	-1.5%	+2.7%	+7.5%	+8.2%	+9.0%	+8.0%	1414
Lipper Tax Exempt MM Fund Index	+0.9%	-1.9%	+2.2%	+6.8%	+9.2%	+6.5%	+7.9%	

+0.0%

+0.2%

+0.2%

+0.2%

+0.9%

\* Includes Fidelity Private Wealth Management® accounts only.

+0.0%

+0.0%

Barclays Municipal Bond Index

Add/edit index

## Goal Performance: Mike's Retirement\*

Mike's Retirment

Grandkid's Education

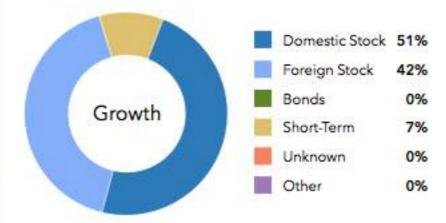
Mike's Wealth Transfer

Your Goal's Total Balance is \$5,963,258.99\* AS OF /08/06/2015

You have 2 Fidelity Private Wealth Management accounts allocated toward this goal.

### Your Goal's Investment Strategy

Your goal's assets are being invested using a Growth With Income investment style, resulting in the following breakdown of current investments:



24

24

News & Insights

Accounts & Trade

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Research

Guidance & Retirement Investment Products

PWM Account Summary > PWM Goal Performance Details

27

# Goal Performance: Mike's Retirement\*

27

Grandkid's Education Mike's Wealth Transfer

27

### Your Goal's Total Balance is \$5,963,258.99\* AS OF /08/06/2015

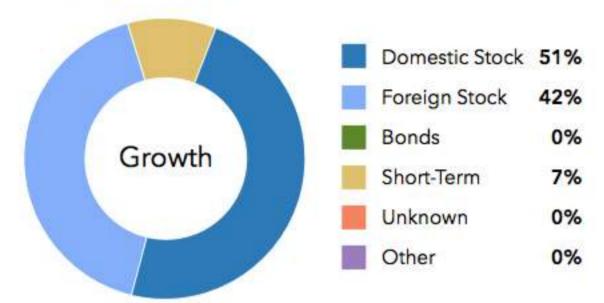
You have 2 Fidelity Private Wealth Management accounts allocated toward this goal.

Mike's Retirment

18

## Your Goal's Investment Strategy

Your goal's assets are being invested using a Growth With Income investment style, resulting in the following breakdown of current investments:

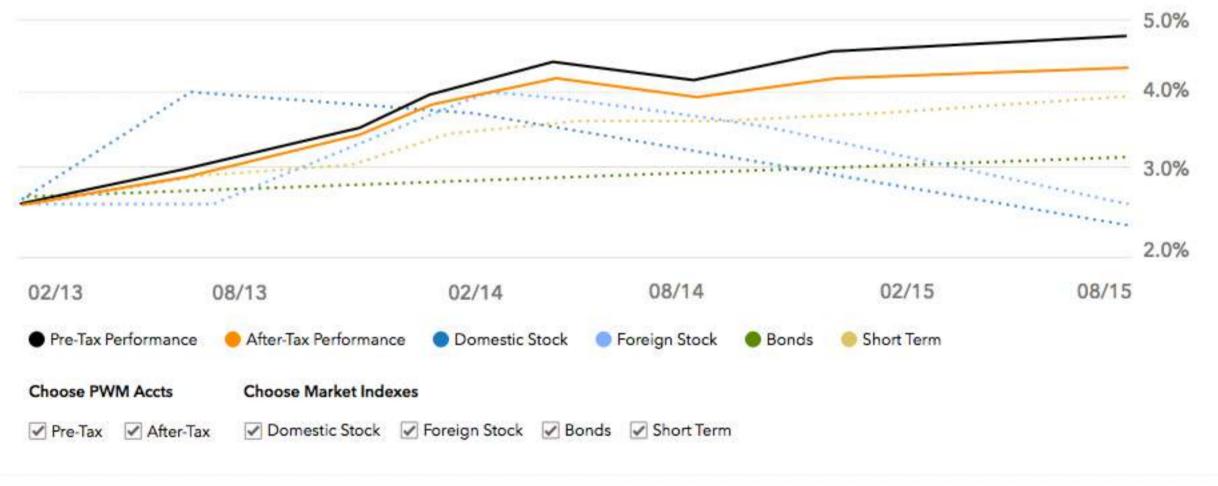


18

## Your Goal's Cumulative Performance

1-Month | 3-Month | Year-to-Date | 1-Year | 3-Year | Life of Reporting

02/12/2012 - 08/31/2015



See definitions

18

# Your Goal's Annualized Performance

Download performance data to spreadsheet

AS OF 02/12/2012 - 08/31/2015

	1-Month	3-Month	YTD	1-Year	3-Year	5-Year	10-Year	Life
Your PWM Goal Account (Pre-Tax)	+2.2%	-1.5%	+2.7%	+7.5%	+8.2%	+9.0%	+8.0%	+7.9%
PWM CUSTOM BENCHMARKS								
Pre-Tax: Custom Benchmark Name	+0.9%	-1.9%	+2.2%	+6.8%	+9.2%	+6.5%	+7.9%	50
HISTORICAL ACCOUNTS (No longer alloc	ated toward t	his goal)						
PWM Account Name Y23123123	+0.9%	-1.9%	+2.2%	+6.8%	+9.2%	+6.5%	+7.9%	
PWM Account Name Y32432434	+0.0%	+0.0%	+0.0%	+0.2%	+0.2%	+0.2%	+0.9%	**
ALLOCATED ACCOUNTS								
PWM V2 Growth Y23123123	30	(900)	**	+6.8%	+9.2%	+6.5%	+7.9%	**
PWM FWMA Y32432434	322	10.50	0.0%	+0.2%	+0.2%	+0.2%	+0.9%	7.7
MARKET INDEX COMPARISONS								
Dow Jones U.S. Total Stock Market Index	+2.2%	-1.5%	+2.7%	+7.5%	+8.2%	+9.0%	+8.0%	
Lipper Tax Exempt MM Fund Index	+0.9%	-1.9%	+2.2%	+6.8%	+9.2%	+6.5%	+7.9%	
Barclays Municipal Bond Index	+0.0%	+0.0%	+0.0%	+0.2%	+0.2%	+0.2%	+0.9%	

### Add/edit index

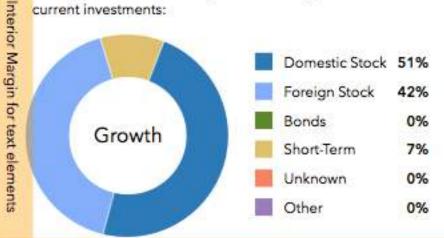
<sup>\*</sup> Includes Fidelity Private Wealth Management® accounts only.

#### 42 - Card Interior Padding top/bottom

### Your Goal's Investment Strategy

42 -

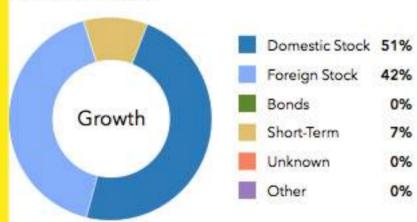
Your goal's assets are being invested using a Growth With Income investment style, resulting in the following breakdown of current investments:



#### 42 - Card Interior Padding top/bottom

#### Your Goal's Investment Strategy

Your goal's assets are being invested using a Growth With Income investment style, resulting in the following breakdown of current investments:



#### Avenir Next, Medium Size: 18px Line spacing 24px Color: 000000

Size: 12px

Line spacing 15px Color: 666666

Avenir Next, Regular Size: 15px Line spacing 21px Color: 666666

# EXPANDED DEFINITIONS DRAWER:

# Cumulative Performance

Use the chart on the left to see the total return of your portfolio over time, measuring the overall percentage chang account.

# Market Index Comparisons

# Compare your portfolio's cumulative performance with market indexes representing the various asset classes.

# Pre and After-Tax Performance

Measure the performance of your account both before and after the impact of taxes. Your after-tax returns take you rates into consideration.

# **Annualized Peformance**

See the table below for average annualized performance over different time periods. Returns for less than 1 year at annualized, but rather are cumulative.

PWM Account Summary > PWM Goal Performance Details

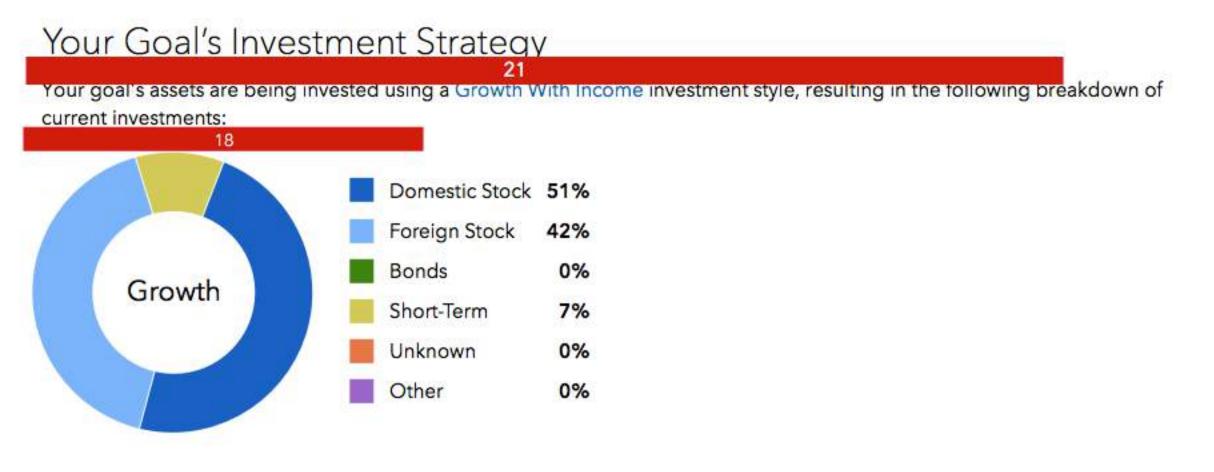
# Goal Performance: Mike's Retirement\*

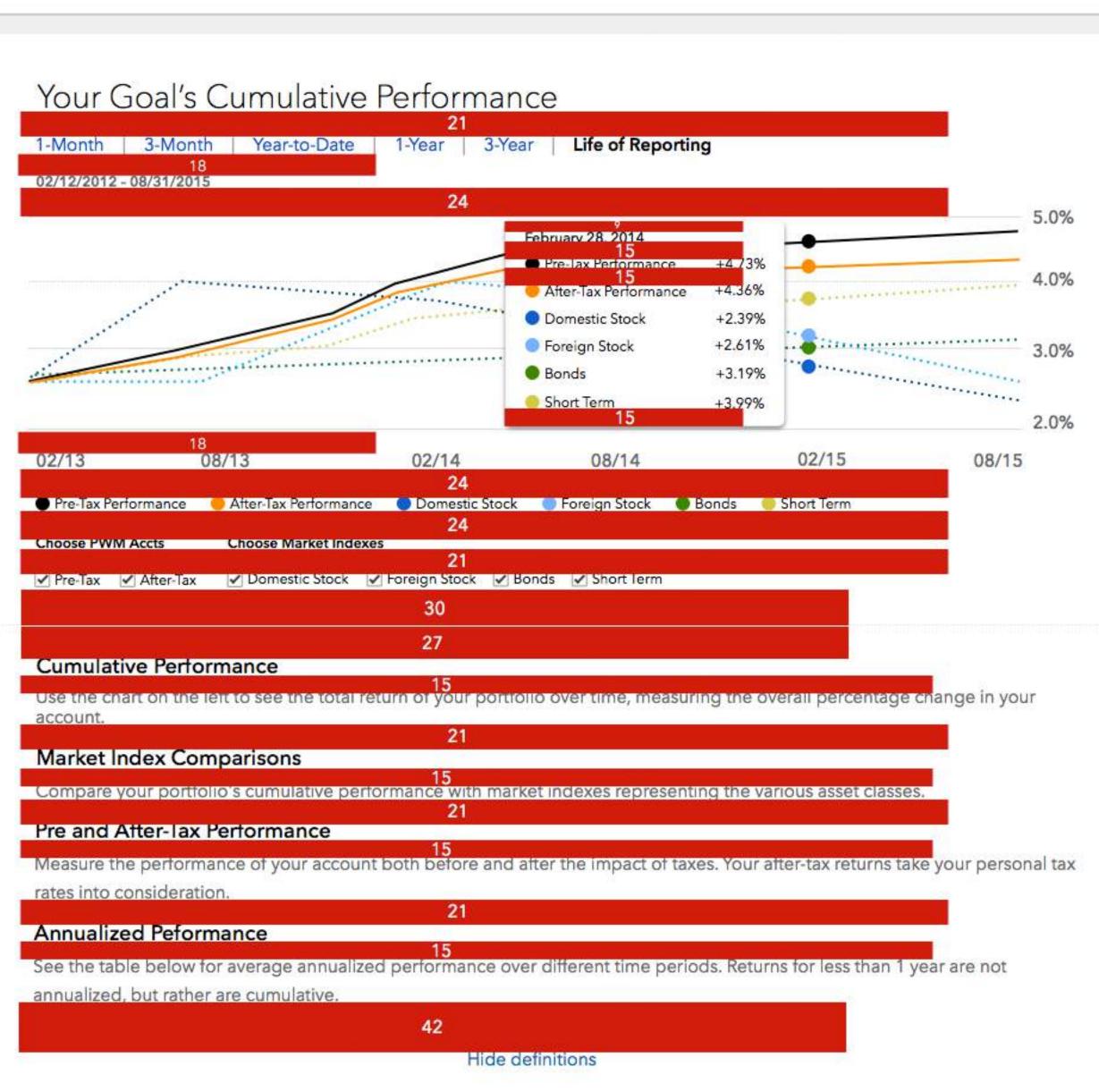
Mike's Retirment

Grandkid's Education

Mike's Wealth Transfer

## Your Goal's Total Balance is \$5,963,258,99\* AS OF /08/06/2015 You have 2 Fidelity Private Wealth Management accounts allocated toward this goal.





AS OF 02/12/2012 - 08/31/2015		21						
		27						
18 12	1-Wonth	3-Month	YTD	1-Year	3-Year	5-Year	10-Year	Life
18 Your PWM Goal Account (Pre-Tax) 12	+2.2%	-1.5%	+2.7%	+7.5%	+8.2%	+9.0%	+8.0%	+7.9
PWM CUSTOM BENCHMARKS				-				
re-lax: Custom Benchmark Name	+0.9%	-1.9%	+2.2%	+6.8%	+9.2%	+6.5%	+7.9%	
12 HISTORICAL ACCOUNTS (No longer allocation) 12	ated toward t	this goal)		-				
PWM Account Name 723123123	+0.9%	-1.9%	+2.2%	+6.8%	+9.2%	+6.5%	+7.9%	**
PWM Account Name 732432434	+0.0%	+0.0%	+0.0%	+0.2%	+0.2%	+0.2%	+0.9%	**
ALLOCATED ACCOUNTS								
PWM V2 Growth /23123123			**	+6.8%	+9.2%	+6.5%	+7.9%	
PWM FWMA 732432434			0.0%	+0.2%	+0.2%	+0.2%	+0.9%	
MARKET INDEX COMPARISONS								
Dow Jones U.S. Total Stock Market Index	+2.2%	-1.5%	+2.7%	+7.5%	+8.2%	+9.0%	+8.0%	**
Lipper Tax Exempt MM Fund Index	+0.9%	-1.9%	+2.2%	+6.8%	+9.2%	+6.5%	+7.9%	**
Barclays Municipal Bond Index 18	+0.0%	+0.0%	+0.0%	+0.2%	+0.2%	+0.2%	+0.9%	**
		30						
Add/edit index		21					25	

Barrier de la companya del companya de la companya del companya de la companya de

# Mike's Retirement\* Mike's Retirement

accounts allocated toward this goal.

Your Goal's Total Balance is \$5,963,258.99\* AS OF 08/06/2015 You have 2 Fidelity Private Wealth Management

Growth

Performance

08/13

Pre-Tax Performance

Performance

AS OF 02/12/2012 - 08/31/2015

✓ Pre-Tax

✓ After-Tax

Filter by:

Account

1 Month

3 Month

YTD

1 Year

3 Year

5 Year

10 Year

Benchmark

1 Month

3 Month

YTD

1 Year

3 Year

5 Year

10 Year

1 Month

3 Month

YTD

1 Year

3 Year

5 Year

10 Year

1 Month

3 Month

YTD

1 Year

3 Year

5 Year

10 Year

Life

Account Number

Life

Account Name

Life

Life

02/12/2012 - 08/31/2015

Your Goal's Cumulative

February 28, 2014

Choose PWM Accts Choose Market Indexes

08/14

Domestic Stock

Foreign Stock

See definitions

Download performance data to spreadsheet

+2.2%

+2.2%

+2.2%

+2.2%

+2.2%

+2.2%

+2.2%

+2.2%

+2.2%

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+2.2%

+2.2%

Y23123123

+2.2%

+2.2%

+2.2%

+2.2%

+2.2%

+2.2%

+2.2%

+2.2%

PWM FWMA

Y23123123

+2.2%

+2.2%

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+2.2%

+2.2%

+2.2%

Index

+2.2%

+2.2%

+2.2%

+2.2%

+2.2%

+2.2%

+2.2%

+2.2%

Barclays Municipal Bond

Fund Index

Lipper Tax Exempt MM

Dow Jones U.S. Total Stock Market Index

MARKET INDEX COMPARISONS

CONTRIBUTING ACCOUNTS

Account Number

1 Month

3 Month

YTD

1 Year

3 Year

5 Year

10 Year

1 Month

3 Month

YTD

1 Year

3 Year

5 Year

Life

Index

1 Month

3 Month

YTD

1 Year

3 Year

5 Year

10 Year

Life

Index

1 Month

3 Month

YTD

1 Year

3 Year

5 Year

10 Year

Life

Index

1 Month

3 Month

YTD

1 Year

3 Year

5 Year

10 Year

Add/edit index

Life

10 Year

Account Name

Account Number

Life

Account Name PWM V2 Growth

PWM CUSTOM BENCHMARKS

Goal Performance:

PWM Account Summary > PWM Goal Performance Details >

Fidelity.

Your Goal's Investment Strategy Your goal's assets are being invested using a Growth With Income investment style, resulting in the 0%

following breakdown of current investments: Domestic Stock 51% Foreign Stock 42% 7% 0% 0%

Bonds

Other

Short-Term

Unknown 1D | 3M | YTD | 1Y | 3Y | Life 4%

Pre-Tax Performance +4.73% 3% After-Tax Performance +4.36% 2% 02/15 08/15

Short Term

After-Tax Performance Your Goal's Annualized

Your PWM Goal Account (Pre-Tax)

Pre-Tax Custom Benchmark Name

HISTORICAL ACCOUNTS (no longer allocated toward this goal) PWM Account Name Account Number Y23123123

Account Name PWM Account Name Y23123123

Fidelity. Log Out Goal Performance: Mike's Retirement\* Mike's Retirement Your Goal's Total Balance is \$5,963,258.99\* AS OF 08/06/2015 You have 2 Fidelity Private Wealth Management accounts allocated toward this goal. Your Goal's Investment Strategy

Your goal's assets are being invested using a Growth

Domestic Stock

Foreign Stock

Bonds

Short-Term

Unknown

Other

51%

42%

0%

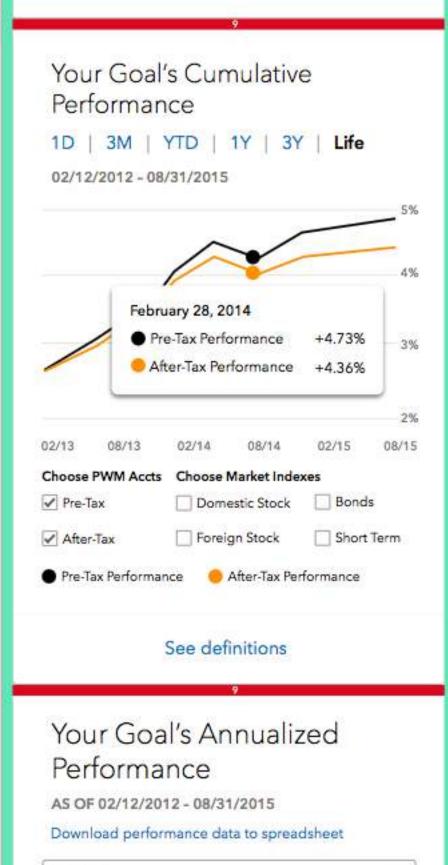
7%

0%

0%

With Income investment style, resulting in the following breakdown of current investments:

Growth



#### +2.2% +2.2%

+2.2%

+2.2%

+2.2%

+2.2%

+2.2%

Your PWM Goal Account (Pre-Tax)

Filter by:

Account

1 Month

3 Month

YTD

1 Year

3 Year

5 Year

10 Year

1 Month

3 Year

5 Year

10 Year

1 Month

3 Month

10 Year

Life

Benchmark	Pre-Tax Custom Benchmark Name
PWM CUSTOM	BENCHMARKS
Life	72.20

3 Month	+2.270	
YTD	+2.2%	
1 Vone	±2.2%	

+2.2%

+2.2%

+2.2%

+2.2%

Account Number Y23123123

+2.2%

+2.2%

+2.2%

HISTORICAL ACC	HISTORICAL ACCOUNTS (no longer allocated toward this goal)				
Account Name	PWM Account Name				

YTD	+2.2%	
1 Year	+2.2%	
3 Year	+2.2%	
5 Year	+2.2%	

+2.2%

+2.2%

+2.2%

+2.2%

+2.2%

Account Name PWM Account Name

Account Number Y23123123

3 Month +2.2%

1 Month

YTD

1 Year

5 Year

Life

YTD

1 Year

3 Year

5 Year

10 Year

3 Month

YTD

1 Year

3 Year

5 Year

Life

Index

1 Month

3 Month

YTD

1 Year

3 Year

5 Year

10 Year

Add/edit index

Life

10 Year

10 Year

3 Year	+2.2%	

+2.2%

+2.2%

+2.2%

	C- 17 - 17 - 17 - 17 - 17 - 17 - 17 - 17
1 Month	+2.2%

+2.2%

+2.2%

+2.2%

+2.2%

+2.2%

Account Name PWM V2 Growth

Account Number Y23123123

3 Month +2.2%

CONTRIBUTING ACCOUNTS

Life	+2.2%	
Account Name	PWM FWMA	
Account Number	Y23123123	
1 Month	+2.2%	
3 Month	+2.2%	
YTD	+2.2%	
1 Year	+2.2%	
3 Year	+2.2%	
5 Year	+2.2%	
10 Year	+2.2%	
Life	+2.2%	
MARKET INDEX C	OMPARISONS	
Index	Dow Jones U.S. Total Stock Market Index	
1 Month	+2.2%	

+2.2%

+2.2%

+2.2%

+2.2%

+2.2%

+2.2%

+2.2%

Fund Index

+2.2%

Lipper Tax Exempt MM

3 Month	+2.2%
YTD	+2.2%
1 Year	+2.2%
3 Year	+2.2%
5 Year	+2.2%
10 Year	+2.2%
Life	+2.2%
Index	Barclays Municipal Bond Index
1 Month	+2.2%

+2.2%

+2.2%

+2.2%

+2.2%

+2.2%

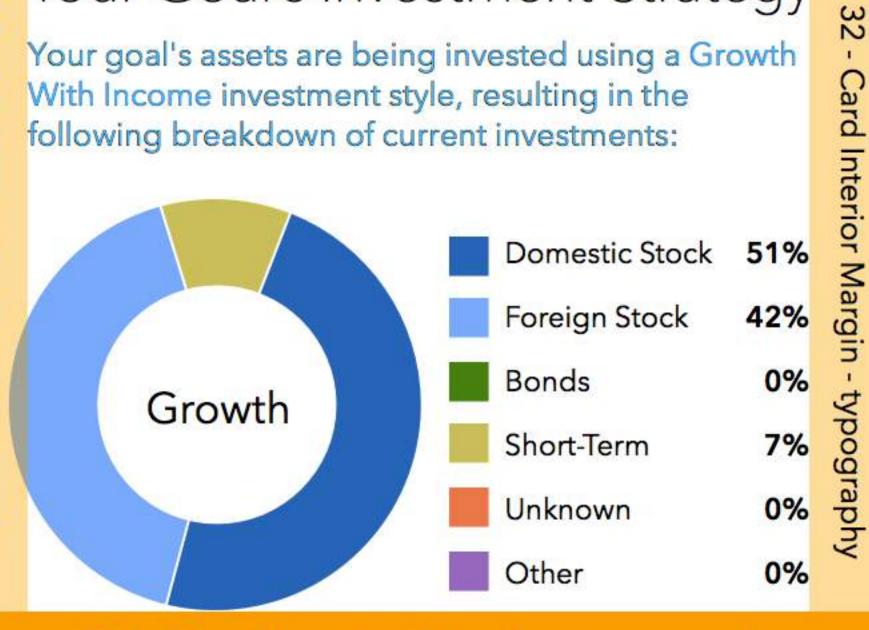
+2.2%

+2.2%

# 32 - Card Interior Margin - typography

# Your Goal's Investment Strategy

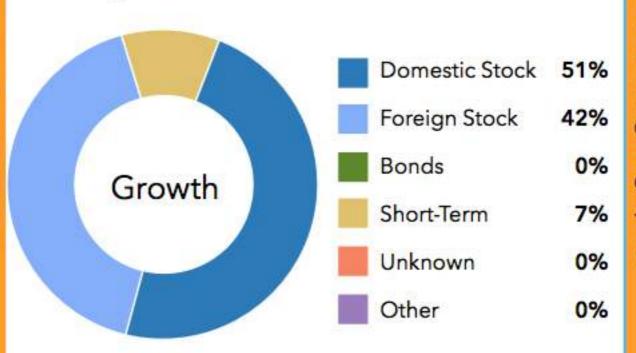
Your goal's assets are being invested using a Growth With Income investment style, resulting in the following breakdown of current investments:



32 - Card Interior Margin - typography

# Your Goal's Investment Strategy

Your goal's assets are being invested using a Growth With Income investment style, resulting in the following breakdown of current investments:



Avenir Next LT Pro, Thin Line spacing 24px Color: 000000

Avenir Next, Demi Bold Size: 21px Line spacing 24px Color: 000000



GOAL PERFORMANCE DETAILS - iPhone 6

PWM Account Summary > PWM Goal Performance Details >

# Goal Performance: Mike's Retirement\*

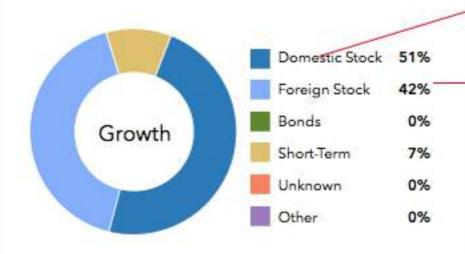
Mike's Retirement

Your Goal's Total Balance is \$5,963,258.99\* AS OF 08/06/2015

You have 2 Fidelity Private Wealth Management accounts allocated toward this goal.

## Your Goal's Investment Strategy

Your goal's assets are being invested using a Growth With Income investment style, resulting in the following breakdown of current investments:



Avenir Next, Demi Bold Size: 12px Line spacing 15px Color: 000000

Avenir Next, Demi Bold Size: 12px Line spacing 15px Color: 666666

Avenir Next, Regular Size: 12px Line spacing 15px Color: 000000

Avenir Next, Regular Size: 11px Line spacing 15px Color: 000000

Avenir Next, Demi Bold Size: 11px Line spacing 15px Color: 000000

#### Avenir Next, Regular Size: 15px Line spacing 21px Color: 0f57c2

Avenir Next, Demi Bold Size: 12px Line spacing 15px Color: 666666

**Avenir Next, Medium** Size: 12px Line spacing 15px Color: 000000

Avenir Next, Regular Size: 12px Line spacing 15px Color: 000000

Avenir Next, Regular Size: 11px Line spacing 15px Color: 000000

Avenir Next, Regular Size: 15px Line spacing 21px Color: 0f57c2

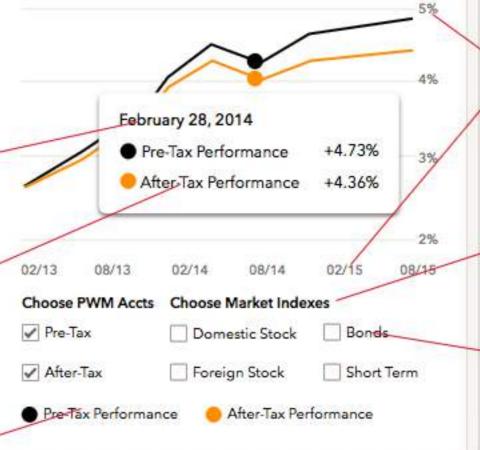
Avenir Next, Demi Bold Size: 12px Line spacing 15px Color: 000000

Avenir Next, Demi Bold Size: 12px Line spacing 15px Color: 666666

### Your Goal's Cumulative Performance

1D | 3M | YTD | 1Y | 3Y | Life 1

02/12/2012 - 08/31/2015



See definitions

### Your Goal's Annualized Performance

AS OF 02/12/2012 - 08/31/2015

Download performance data to spreadsheet

Account	Your PWM Goal Account (Pre-Tax
1 Month	+2.2%
3 Month	+2.2%
YTD	+2.2%
1 Year	+2.2%
3 Year	+2.2%
5 Year	+2.2%
10 Year	+2.2%
Life	+2.2%

T TTIM COSTON	DENGINIANG
Benchmark	Pre-Tax Custom Benchmark Name
1 Month	+2.2%
3 Month	+2.2%
VTD	+2.2%

Avenir Next, Demi Bold Size: 15px Line spacing 21px Color: 000000

**Avenir Next, Medium** Size: 10px Line spacing 15px Color: 666666

Avenir Next, Demi Bold Size: 11px Line spacing 15px Color: 000000

Avenir Next, Regular Size: 11px Line spacing 15px Color: 000000

Avenir Next, Regular Size: 12px Line spacing 15px Color: 0f57c2

Avenir Next, Regular Size: 12px Line spacing 15px Color: 000000

Avenir Next, Regular Size: 12px Line spacing 15px Color: 000000, e01616, 0d6f3f

Mike's Retirement\* Mike's Retirement

accounts allocated toward this goal.

Your Goal's Total Balance is \$5,963,258,99\* AS OF 08/06/2015 You have 2 Fidelity Private Wealth Management

Goal Performance:

PWM Account Summary > PWM Goal Performance Details >

Your Goal's Investment Strategy Your goal's assets are being invested using a Growth With Income investment style, resulting in the following breakdown of current investments:

Growth

**Performance** 

Pre-lax Performance

✓ After-Tax

<u>Performance</u>

✓ Pre-Tax

Filter by:

1 Month

3 Month

YTD

1 Year

3 Year

5 Year

10 Year

1 Month

3 Month

YTD

1 Year

3 Year

5 Year

10 Year

1 Month

3 Month

YTD

1 Year

3 Year

5 Year

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10 Year

1 Month

3 Month

YTD

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3 Year

5 Year

10 Year

1 Month

3 Month

YTD

1 Year

3 Year

5 Year

10 Year

Life

Index

1 Month

3 Month

YTD

1 Year

3 Year

5 Year

10 Year

Life

Index

1 Month

3 Month

YTD

1 Year

3 Year

5 Year

10 Year

Life

Index

1 Month

3 Month

YTD

1 Year

3 Year

5 Year

10 Year

Add/edit index

Life

Life

Life

Account Name

Account Number Y23123123

Life

Life

Life

02/12/2012 - 08/31/2015

Your Goal's Cumulative

February 28, 2014

Choose PWM Accts Choose Market Indexes

Pre-Tax Performance

After-Tax Performance

30

See definitions

+2.2%

+2.2%

+2.2%

+2.2%

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+2.2%

+2.2%

+2.2%

+2.2%

Y23123123

+2.2%

+2.2%

+2.2%

+2.2%

+2.2%

+2.2%

+2.2%

+2.2%

+2.2%

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+2.2%

+2.2%

+2.2%

+2.2%

+2.2%

+2.2%

+2.2%

+2.2%

+2.2%

Index

+2.2%

+2.2%

+2.2%

+2.2%

+2.2%

+2.2%

+2.2%

+2.2%

21

18

Barclays Municipal Bond

Fund Index

Lipper Tax Exempt MM

Dow Jones U.S. Total

Stock Market Index

MARKET INDEX COMPARISONS

Account Name PWM FWMA

Account Number

CONTRIBUTING ACCOUNTS

Account Number Y23123123

Account Name PWM V2 Growth

Account Number Y23123123

Bonds

Other

42% 0% 7% 0% 0%

Domestic Stock Foreign Stock Short-Term Unknown 1D | 3M | YTD | 1Y | 3Y | Life 5% 4% 3%

+4.36% Atter-lax Performance Domestic Stock Bonds Foreign Stock Short Term Your Goal's Annualized Download performance data to spreadsheet Your PWM Goal Account (Pre-Tax)

HISTORICAL ACCOUNTS (no longer allocated toward this goal) Account Name PWM Account Name

PWM Account Name