

PWM Account Summary > PWM Goal Performance Details

Goal Performance: Mike's Retirement*

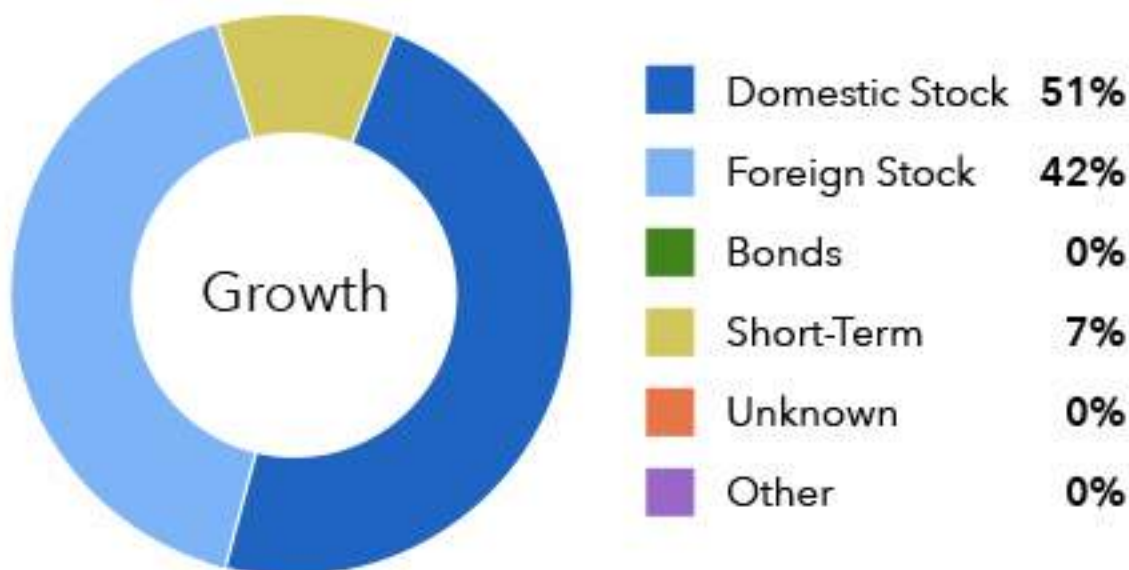
- Mike's Retirement**
- Grandkid's Education
- Mike's Wealth Transfer

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

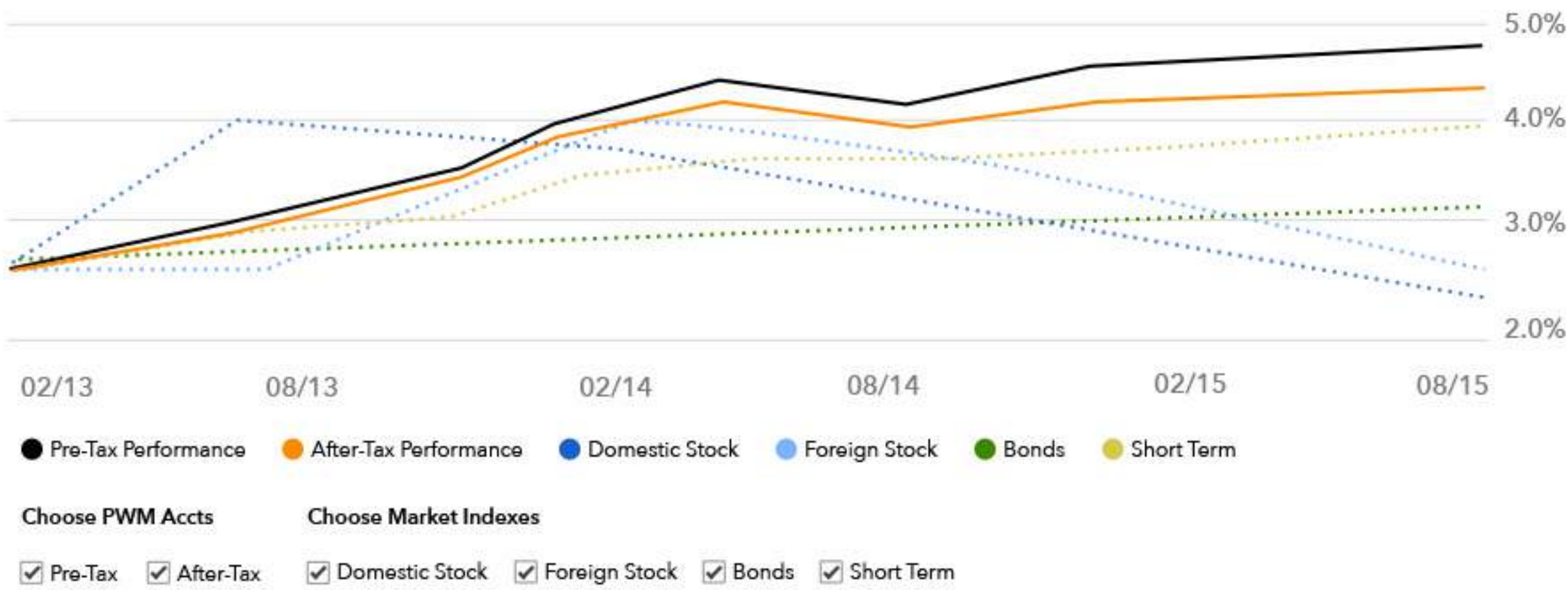
Your goal's assets are being invested using a **Growth With Income** investment style, resulting in the following breakdown of current investments:



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](#)

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%	--
HISTORICAL ACCOUNTS (No longer allocated toward this 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	--	--	--	+6.8%	+9.2%	+6.5%	+7.9%	--
PWM FWMA Y32432434	--	--	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	+0.0%	+0.0%	+0.0%	+0.2%	+0.2%	+0.2%	+0.9%	--

[Add/edit index](#)

* Includes Fidelity Private Wealth Management® accounts only.

PWM Account Summary > PWM Goal Performance Details

Goal Performance: Mike's Retirement*

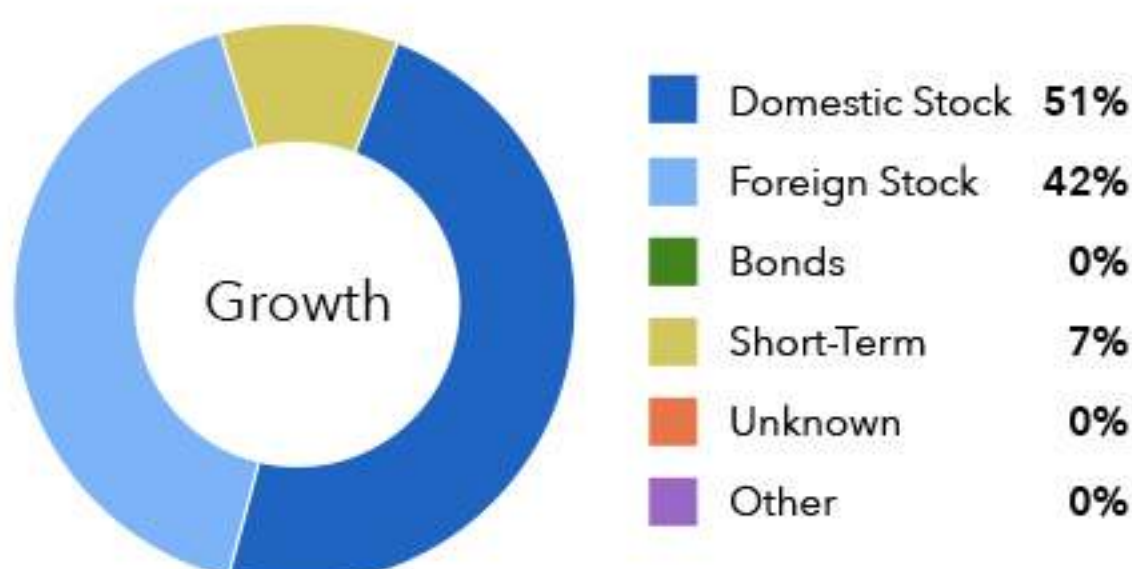
Mike's Retirement | Grandkid's Education | Mike's Wealth Transfer

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Your Goal's Investment Strategy

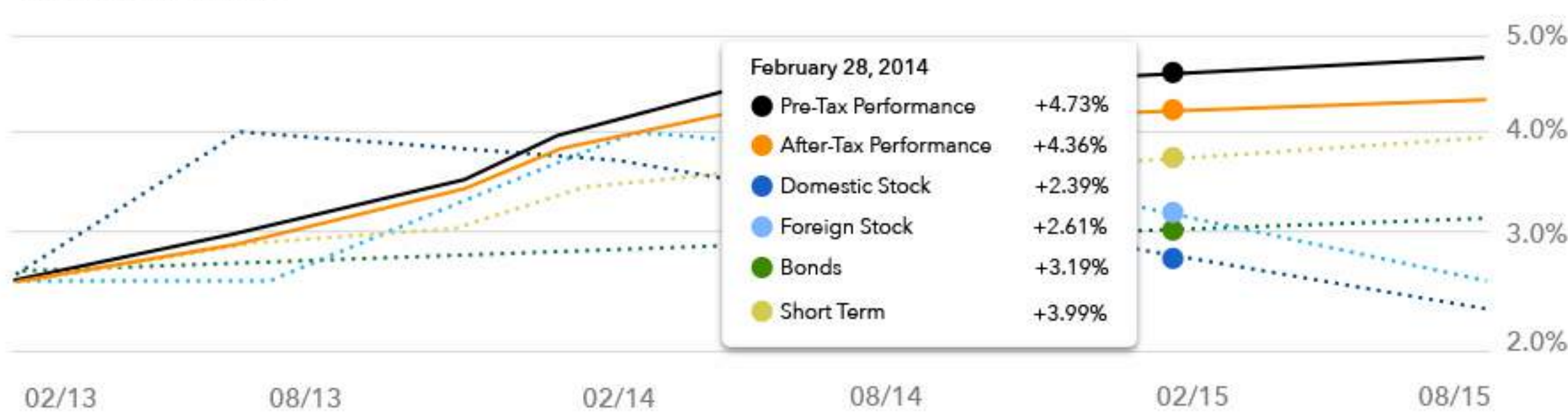
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Your Goal's Cumulative Performance

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

02/12/2012 - 08/31/2015



● Pre-Tax Performance ● After-Tax Performance ● Domestic Stock ● Foreign Stock ● Bonds ● Short Term

Choose PWM Accts

Choose Market Indexes

Pre-Tax After-Tax Domestic Stock Foreign Stock Bonds Short Term

Cumulative Performance

Use the chart on the left to see the total return of your portfolio over time, measuring the overall percentage change in your 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 your personal tax rates into consideration.

Annualized Performance

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

[Hide definitions](#)

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
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PWM CUSTOM BENCHMARKS								
Pre-Tax: Custom Benchmark Name	+0.9%	-1.9%	+2.2%	+6.8%	+9.2%	+6.5%	+7.9%	--
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PWM Account Name Y32432434	+0.0%	+0.0%	+0.0%	+0.2%	+0.2%	+0.2%	+0.9%	--
ALLOCATED ACCOUNTS								
PWM V2 Growth Y23123123	--	--	--	+6.8%	+9.2%	+6.5%	+7.9%	--
PWM FWMA Y32432434	--	--	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	+0.0%	+0.0%	+0.0%	+0.2%	+0.2%	+0.2%	+0.9%	--

[Add/edit index](#)

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Goal Performance: Mike's Retirement*

Mike's Retirement

Grandkid's Education

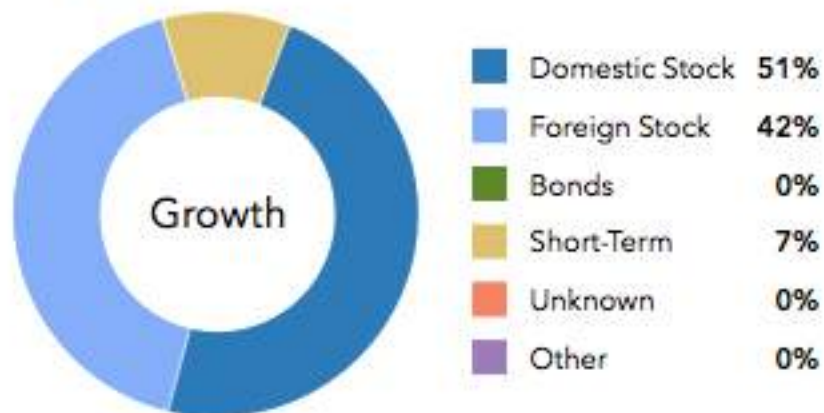
Mike's Wealth Transfer

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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

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PWM Account Summary > PWM Goal Performance Details

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Goal Performance: Mike's Retirement*

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Mike's Retirement

Grandkid's Education

Mike's Wealth Transfer

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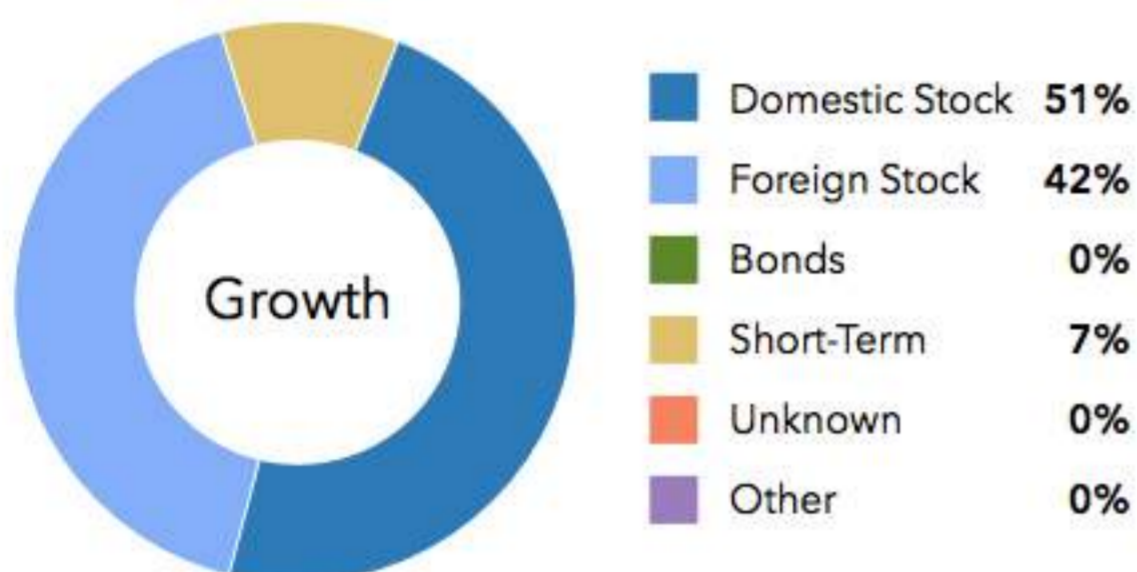
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18

Your Goal's Investment Strategy

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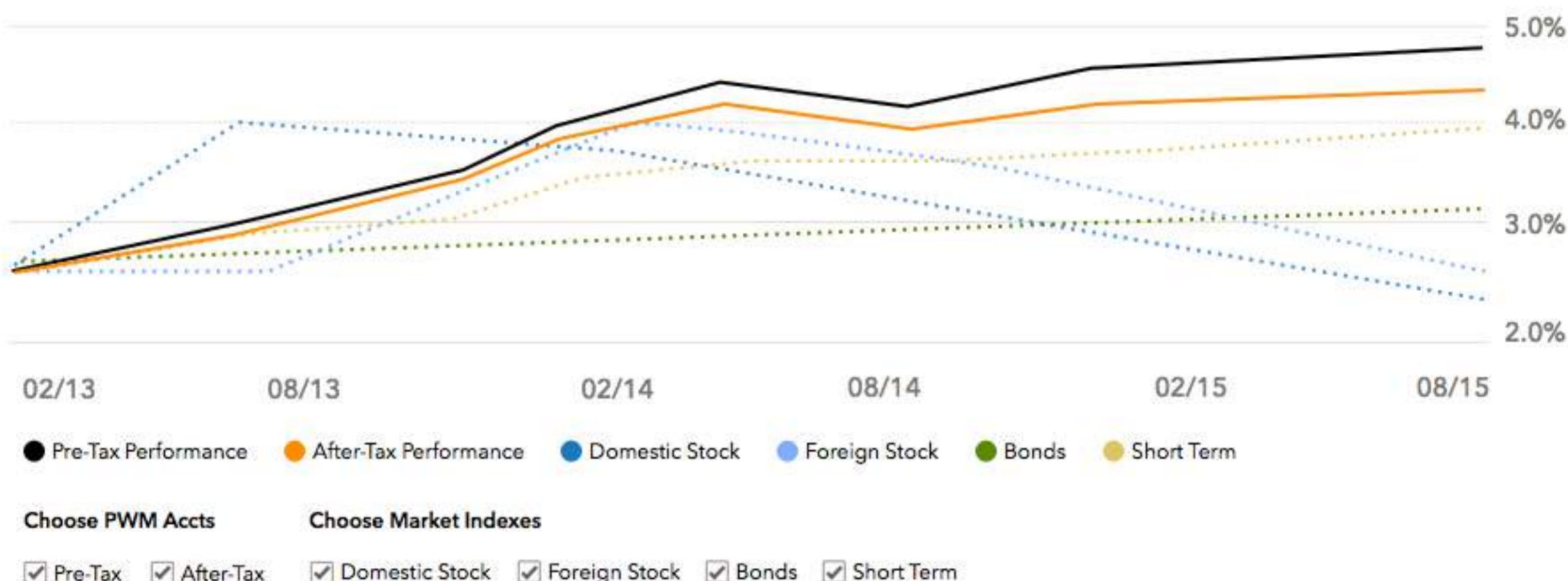


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Your Goal's Cumulative Performance

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%	--
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PWM Account Name Y32432434	+0.0%	+0.0%	+0.0%	+0.2%	+0.2%	+0.2%	+0.9%	--
ALLOCATED ACCOUNTS								
PWM V2 Growth Y23123123	--	--	--	+6.8%	+9.2%	+6.5%	+7.9%	--
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MARKET INDEX COMPARISONS								
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Barclays Municipal Bond Index	+0.0%	+0.0%	+0.0%	+0.2%	+0.2%	+0.2%	+0.9%	--

[Add/edit index](#)

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18

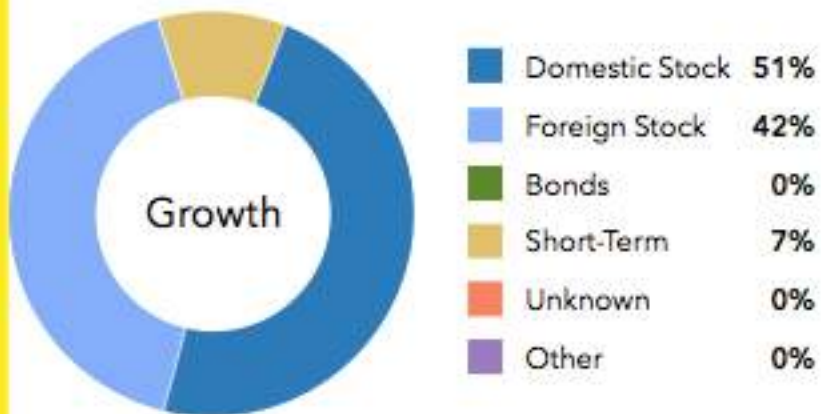
Your Goal's Investment Strategy

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



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PWM Account Summary > PWM Goal Performance Details

Goal Performance: Mike's Retirement*

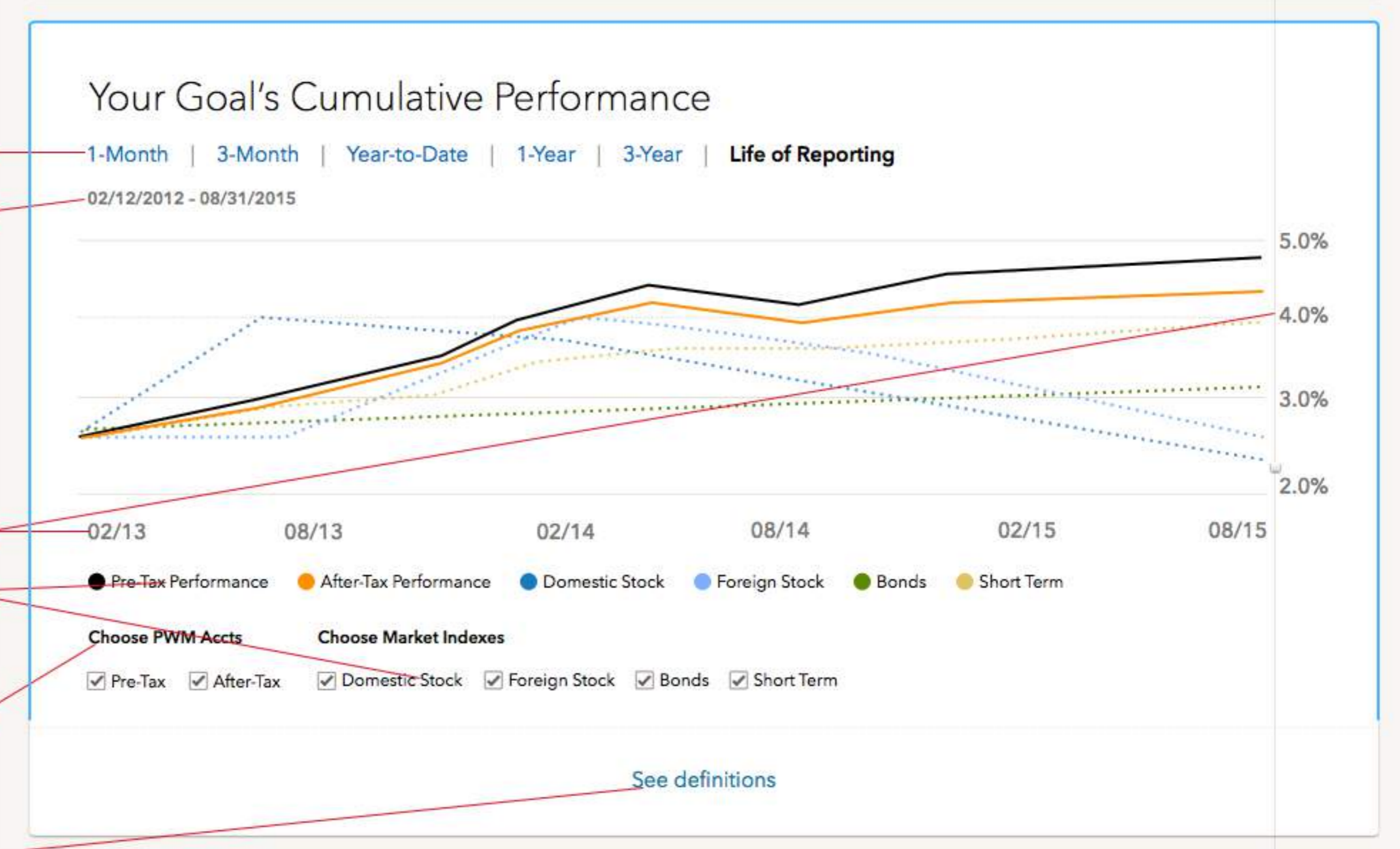
Mike's Retirement Grandkid's Education Mike's Wealth Transfer

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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:

Domestic Stock	51%
Foreign Stock	42%
Bonds	0%
Short-Term	7%
Unknown	0%
Other	0%



Your Goal's Annualized Performance

AS OF 02/12/2012 - 08/31/2015 [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%	--
HISTORICAL ACCOUNTS (No longer allocated toward this goal)								
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PWM Account Name Y32432434	+0.0%	+0.0%	+0.0%	+0.2%	+0.2%	+0.2%	+0.9%	--
ALLOCATED ACCOUNTS								
PWM V2 Growth Y23123123	--	--	--	+6.8%	+9.2%	+6.5%	+7.9%	--
PWM FWMA Y32432434	--	--	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%	--
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Barclays Municipal Bond Index	+0.0%	+0.0%	+0.0%	+0.2%	+0.2%	+0.2%	+0.9%	--

[Add/edit index](#)

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Pre-Tax After-Tax Domestic Stock Foreign Stock Bonds Short-Term

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 change in account value.
- 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 tax rates into consideration.
- Annualized Performance**
See the table below for average annualized performance over different time periods. Returns for less than 1 year are annualized, but rather are cumulative.

PWM Account Summary > PWM Goal Performance Details

Goal Performance: Mike's Retirement*

Mike's Retirement

Grandkid's Education

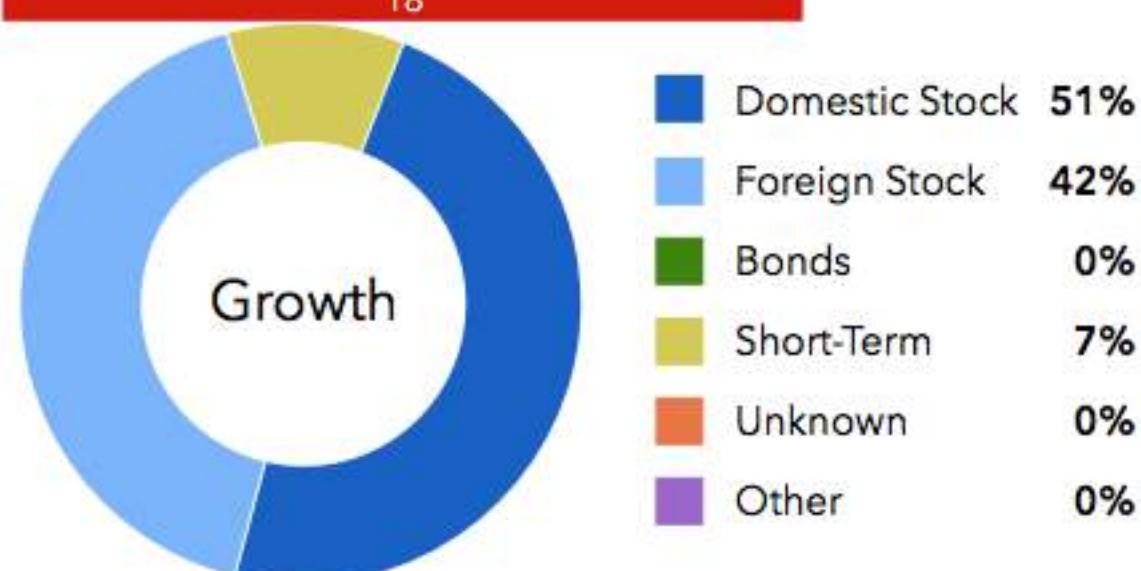
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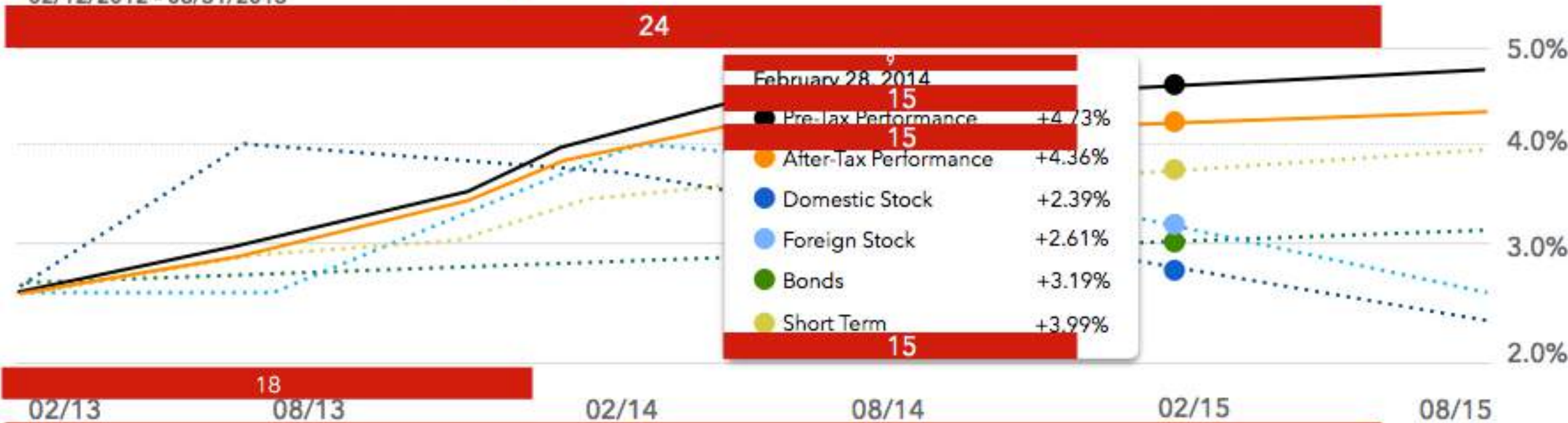
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Your Goal's Cumulative Performance

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

02/12/2012 - 08/31/2015



02/13 | 08/13 | 02/14 | 08/14 | 02/15 | 08/15

Choose PWM Accts | Choose Market Indexes

Pre-Tax After-Tax Domestic Stock Foreign Stock Bonds Short Term

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Hide definitions

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
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Barclays Municipal Bond Index	+0.0%	+0.0%	+0.0%	+0.2%	+0.2%	+0.2%	+0.9%	--

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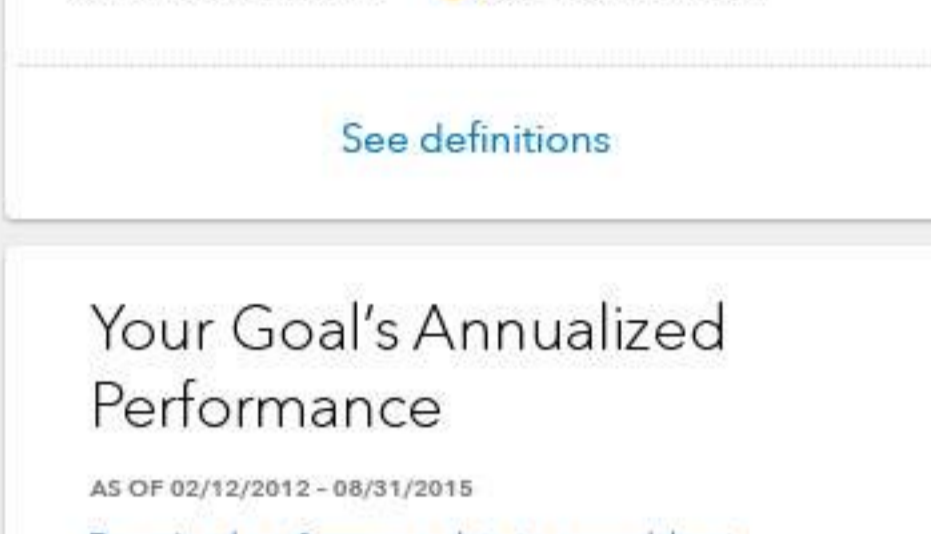
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Your Goal's Cumulative Performance

1D | 3M | YTD | 1Y | 3Y | Life
 02/12/2012 - 08/31/2015



Choose PWM Accts: Pre-Tax After-Tax

Choose Market Indexes: Domestic Stock Foreign Stock Bonds Short Term

● Pre-Tax Performance ● After-Tax Performance

[See definitions](#)

Your Goal's Annualized Performance

AS OF 02/12/2012 - 08/31/2015
[Download performance data to spreadsheet](#)

Filter by: [Dropdown]

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%

PWM CUSTOM BENCHMARKS

Benchmark	Pre-Tax Custom Benchmark Name
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%

HISTORICAL ACCOUNTS (no longer allocated toward this goal)

Account Name	PWM Account Name
Account Number	Y23123123
1 Month	+2.2%
3 Month	+2.2%
YTD	+2.2%
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3 Year	+2.2%
5 Year	+2.2%
10 Year	+2.2%
Life	+2.2%

Account Name	PWM Account Name
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%

Account Name	PWM V2 Growth
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%

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 COMPARISONS

Index	Dow Jones U.S. Total Stock Market Index
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%

Index	Lipper Tax Exempt MM Fund Index
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%

Index	Barclays Municipal Bond Index
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%

[Add/edit index](#)

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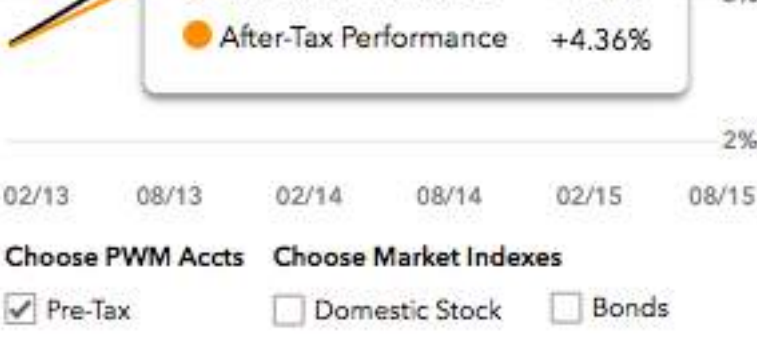
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Your Goal's Cumulative Performance

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

02/12/2012 - 08/31/2015



02/13 08/13 02/14 08/14 02/15 08/15

Choose PWM Accts

Pre-Tax

After-Tax

Choose Market Indexes

Domestic Stock

Foreign Stock

Bonds

Short Term

● Pre-Tax Performance

● After-Tax Performance

[See definitions](#)

Your Goal's Annualized Performance

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

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Filter by: [Dropdown]

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1 Month	+2.2%
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3 Year	+2.2%
5 Year	+2.2%
10 Year	+2.2%
Life	+2.2%

PWM CUSTOM BENCHMARKS

Benchmark	Pre-Tax Custom Benchmark Name
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%

HISTORICAL ACCOUNTS (no longer allocated toward this goal)

Account Name	PWM Account Name
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%

Account Name	PWM Account Name
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%

CONTRIBUTING ACCOUNTS

Account Name	PWM V2 Growth
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%

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 COMPARISONS

Index	Dow Jones U.S. Total Stock Market Index
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%

Index	Lipper Tax Exempt MM Fund Index
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%

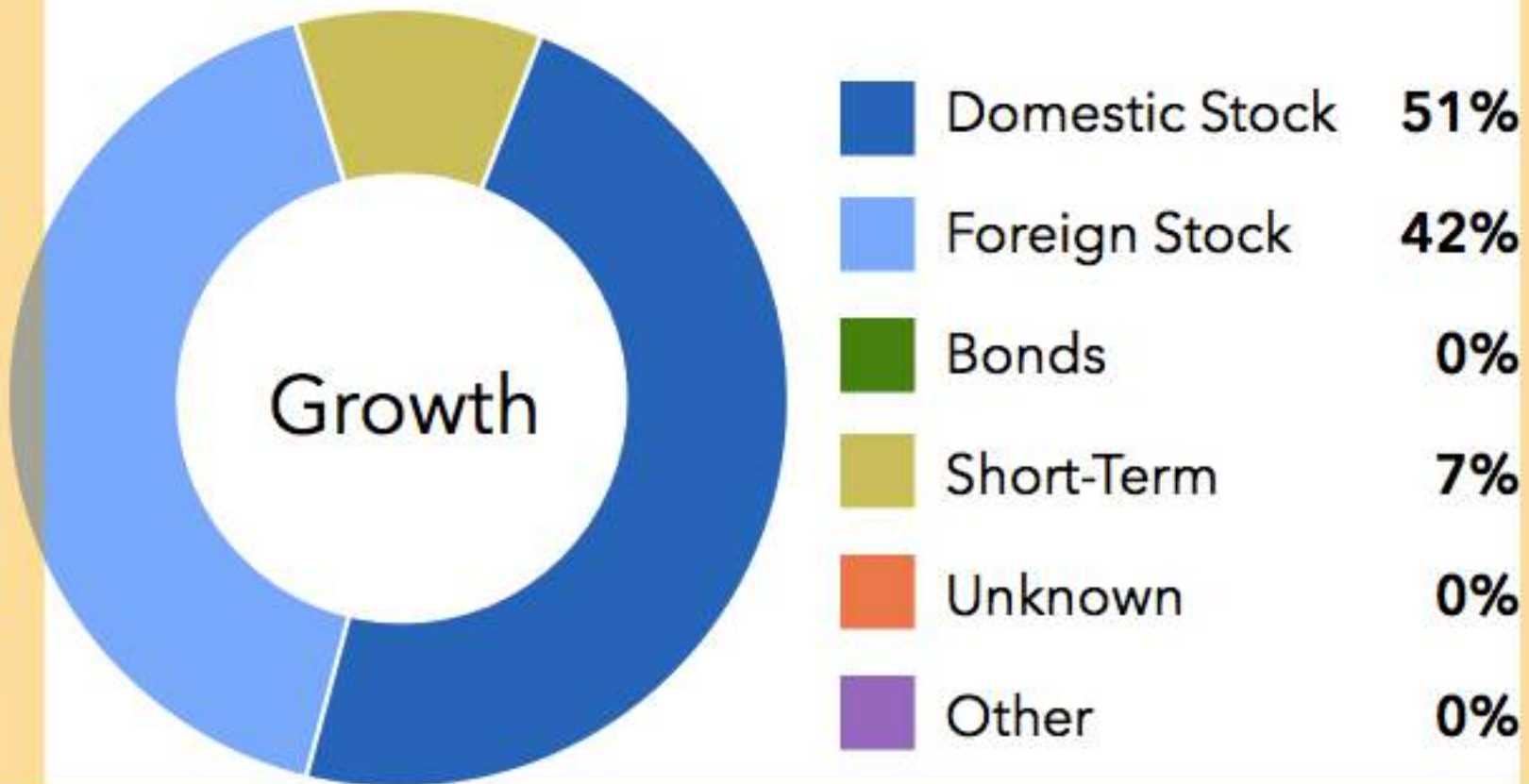
Index	Barclays Municipal Bond Index
1 Month	+2.2%
3 Month	+2.2%
YTD	+2.2%
1 Year	+2.2%
3 Year	+2.2%
5 Year	+2.2%
10 Year	+2.2%
Life	+2.2%

[Add/edit index](#)

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:



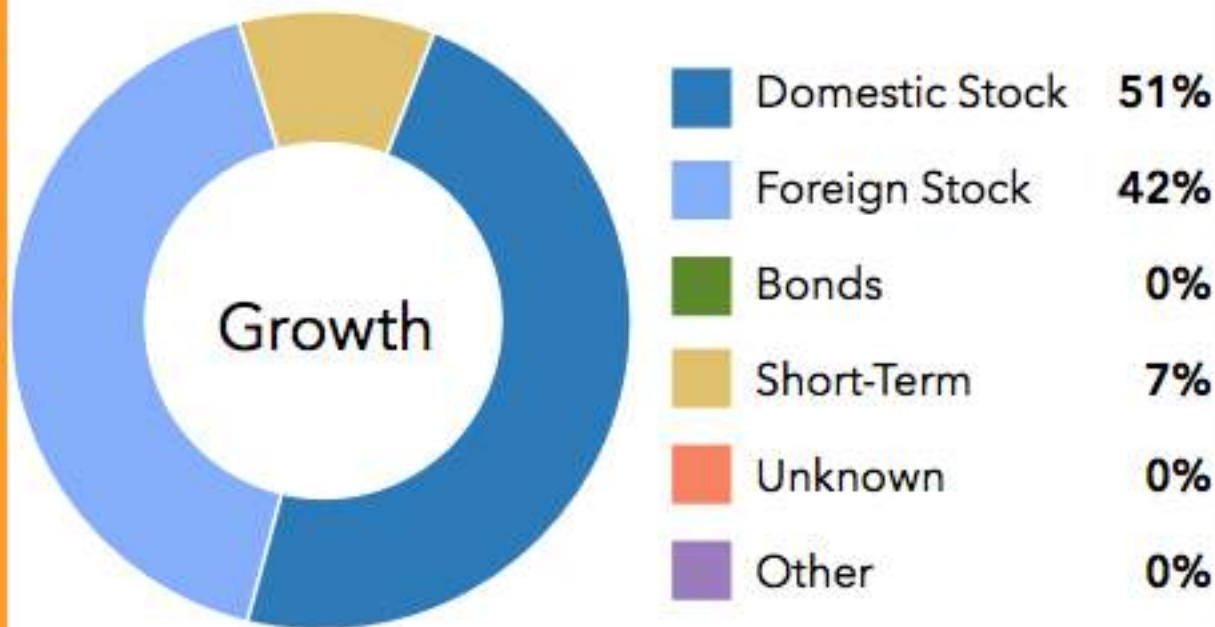
32 - Card Interior Margin - typography

32 - Card Interior Margin - typography

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:



PWM Account Summary > PWM Goal Performance Details >

Goal Performance: Mike's Retirement*

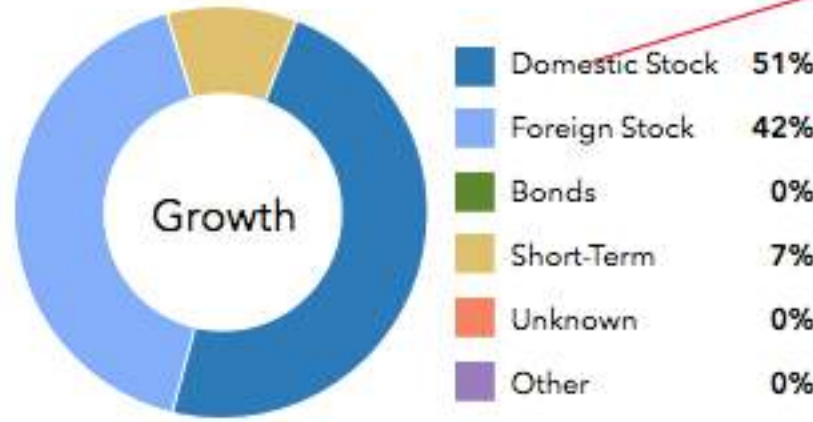
Mike's Retirement

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

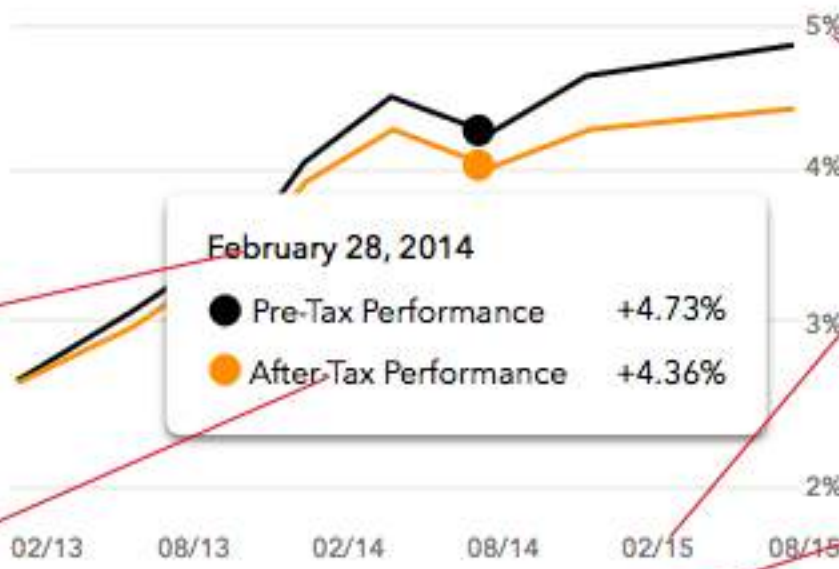
Your goal's assets are being invested using a Growth With Income investment style, resulting in the following breakdown of current investments:



Your Goal's Cumulative Performance

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

02/12/2012 - 08/31/2015



Choose PWM Accts: Pre-Tax After-Tax

Choose Market Indexes: Domestic Stock Foreign Stock Bonds Short Term

● Pre-Tax Performance ● After-Tax Performance

[See definitions](#)

Your Goal's Annualized Performance

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

[Download performance data to spreadsheet](#)

Filter by:

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%

PWM CUSTOM BENCHMARKS

Benchmark	Pre-Tax Custom Benchmark Name
1 Month	+2.2%
3 Month	+2.2%
YTD	+2.2%

Avenir Next, Demi Bold
Size: 11px
Line spacing 15px
Color: 666666

Avenir Next LT Pro, Thin
Size: 11px
Line spacing 15px
Color: 000000

Avenir Next LT Pro, Thin
Size: 21px
Line spacing 24px
Color: 000000

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

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

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
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Color: 000000

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

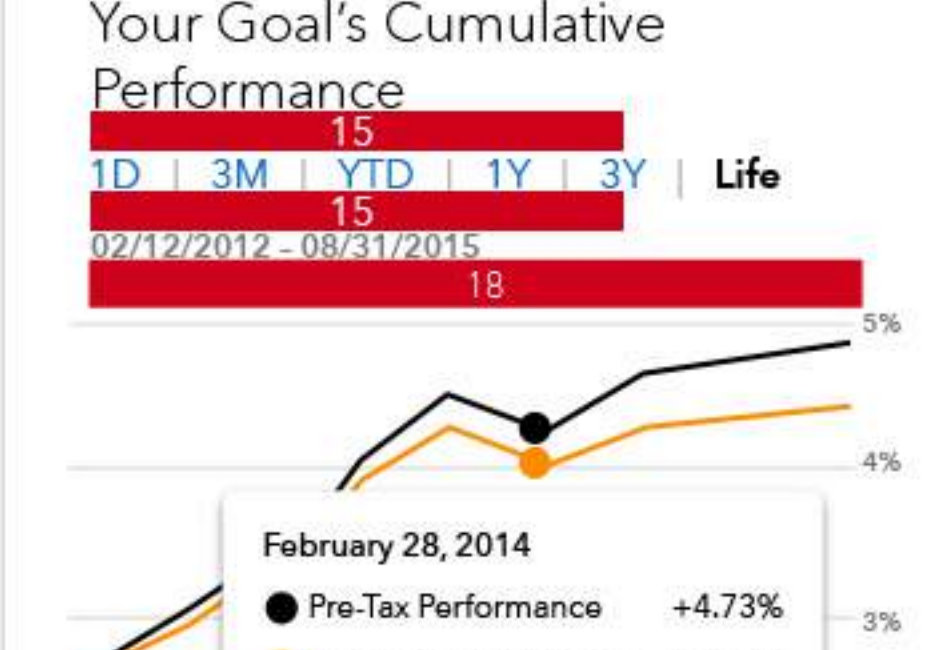
Goal Performance: Mike's Retirement*

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.

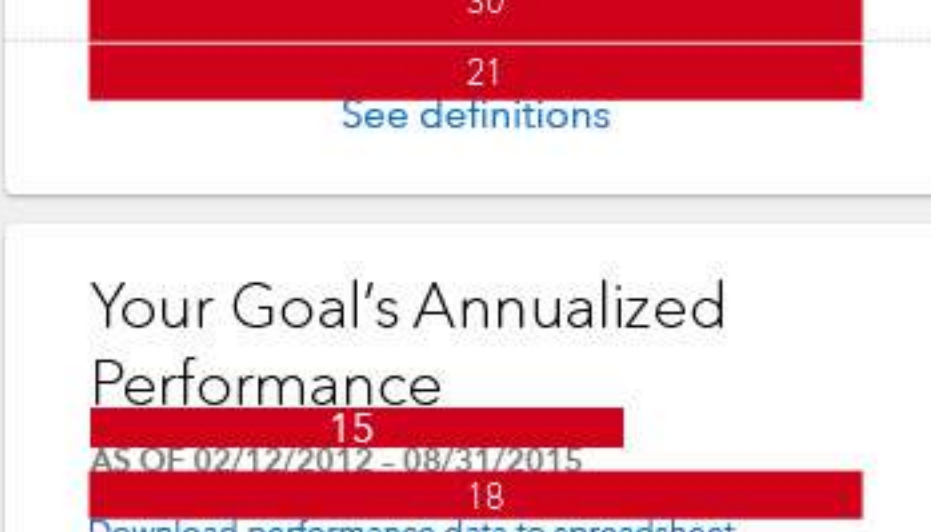
Your Goal's Investment Strategy

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



Your Goal's Cumulative Performance

1D | 3M | YTD | 1Y | 3Y | Life
 02/12/2012 - 08/31/2015



Pre-Tax Performance	+4.73%
After-Tax Performance	+4.36%

Choose PWM Accts: Pre-Tax After-Tax
 Choose Market Indexes: Domestic Stock Foreign Stock Bonds Short Term

[See definitions](#)

Your Goal's Annualized Performance

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

[Download performance data to spreadsheet](#)

Filter by:

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%

PWM CUSTOM BENCHMARKS

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%

HISTORICAL ACCOUNTS (no longer allocated toward this goal)

Account Name	PWM Account Name
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%

Account Name	PWM Account Name
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 COMPARISONS

Index	Dow Jones U.S. Total Stock Market Index
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%

Index	Lipper Tax Exempt MM Fund Index
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%

Index	Barclays Municipal Bond Index
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%

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