



Walkme

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Net Worth MY ACCOUNTS

▲ 4% | \$200,000K since April 2016

\$5,435,000

Investments	\$3.85M
Assets	\$2.1M
Liabilities	\$510K

Goal Tracker GOAL PLANNING

Financial Plan
75%
Probability of Success

Activity ALL ACTIVITY

- Vanguard IRA Account** can't connect, please update your account login. 4 Hours Ago
- Account Statement** was added to your documents. 8 Hours Ago
- Annual Review** was added to your documents. 1 Day Ago

Accounts Overview		Total Net \$00.00	Total Gain \$00.00
Individual Brokerage xxxx-8023	Net Account Value	\$0.00	>
Advisor	Day's Gain	\$0.00	>
Individual Brokerage xxxx-8023	Net Account Value	\$0.00	>
Advisor	Day's Gain	\$0.00	>
Individual Brokerage xxxx-8023	Net Account Value	\$0.00	>
Advisor	Day's Gain	\$0.00	>
Individual Brokerage xxxx-8023	Net Account Value	\$0.00	>
Advisor	Day's Gain	\$0.00	>

[View All](#)

Asset Allocations

CATEGORY	SPENDING
Home	\$2,454.16
Uncategorized	\$1,975.19
Auto & Transport	\$1,101.01
Shopping	\$1,021.15
Education	\$640.87
Food & Dining	\$528.19
Bills & Utilities	\$391.62
Financial	\$217.01
Show more	\$182.33
Total	\$8,521.53

[Export to CSV](#)



Net Worth

▲ 4% | Up \$200,000 since April 2016

\$5,435,000



\$3.85m INVESTMENTS

\$2.1m ASSETS

\$510k LIABILITIES

Goal Tracker

Lorem ipsum



Alerts

Vanguard IRA Account 4 Hours ago
Lorem ipsum dolor sit amet, consectetur adip...

Account Statement 8 Hours ago
Lorem ipsum dolor sit amet, consectetur adipi...

Vanguard IRA Account 4 Hours ago
Lorem ipsum dolor sit amet, consectetur adip...

[View All Activity](#)

Accounts Overview

5 Connected

Total Gain \$240,012

Fidelity Brokerage \$425,984
XXXX-0124

MyAdviceArchitect Brokerage \$584,759
XXXX-8023

Vanguard 401(k) \$759,648
XXXX-9215

TD Ameritrade ETF \$599,147
XXXX-7932

Fidelity Roth IRA \$1,235,542
XXXX-1241

[Add Account](#)

Asset Allocation

PORTFOLIO RISK
Aggressive

2017 GROWTH
\$345,781

TOTAL NET
\$3,850,00

YTD CHANGE
+4.5%



- LARGE CAP STOCK FUNDS 50%
- SMALL/MID CAP STOCK FUNDS 25%
- BOND FUNDS 15%
- INTERNATIONAL STOCK FUNDS 10%
- CASH/OTHER 10%

Year	Contributions	Growth	Net	Value
2016	\$105,376	\$262,573	\$3,504,219	8.1%
2015	\$71,799	\$204,602	\$3,241,646	6.9%
2014	\$49,151	\$215,689	\$2,965,245	7.8%

Net Worth

▲ 4% | UP \$200,000 SINCE APRIL 2016

\$5,435,000



INVESTMENTS \$3.85m | ASSETS \$2.1m | LIABILITIES \$510k

[View Portfolio](#)

Goal Tracker

▲ 12% YTD INCREASE



YOUR FINANCIAL PLAN IS WITHIN THE CONFIDENCE ZONE!

[PlayZone](#)

Market Information

CHANGE OVER THE PAST 6 HOURS



DOW JONES 20.7k ▲32.6% | S & P 500 2.3k ▼2.5% | NASDAQ 5.8k ▼5.8%

[View All Activity](#)

Accounts

SHOWING 5 OF 8 CONNECTED ACCOUNTS

TOTAL NET \$3,850,00 [VIEW ALL ACCOUNTS >](#)

ACCOUNT	NET	
John's Brokerage Fidelity Investments Individual XXXX-0345	\$425,984	▲ 1.2%
Jen's Brokerage My Advice Architect Individual Brokerage XXXX-8023	\$584,759	▲ 0.6%
John's 401(k) Vanguard Individual 401(k) XXXX-7631	\$759,648	▲ 2.9%
Account Alias TD Ameritrade Joint ETF XXXX-7932	\$599,147	▲ 7.4%
John's Roth IRA Fidelity Roth IRA XXXX-9799	\$1,235,542	▲ 0.3%

Have more accounts? Add them now!

[+ Add Account](#)

Asset Allocation

PORTFOLIO RISK Aggressive | 2017 GROWTH \$345,781 | TOTAL NET \$3,850,00 | YTD CHANGE ▲ 4.5%



- LARGE CAP STOCK FUNDS 50%
- SMALL/MID CAP STOCK FUNDS 20%
- BOND FUNDS 15%
- INTERNATIONAL STOCK FUNDS 10%
- CASH/OTHER 5%

YEAR	CONTRIBUTIONS	GROWTH	NET	
2016	\$105,376	\$262,573	\$3,504,219	▲ 8.1%
2015	\$71,799	\$204,602	\$3,241,646	▲ 6.9%
2014	\$49,151.00	\$215,689	\$2,965,245	▲ 7.8%

Marketing Information

LOREM IPSUM DOLOR SIT AMET



Investment News



US unemployment hits 4.4%, lowest in a decade
America added a solid 211,000 jobs in April, far surpassing the disappointing 79,000 jobs gained in March, according to Labor Department figures released Friday.
[READ MORE >](#)



Oil drops below \$45 for first time since OPEC deal
U.S. crude prices plunged more than 3% in a matter of minutes on taking the price of a barrel below \$45
[READ MORE >](#)



China seals biggest foreign takeover
ChemChina said Friday that about 80% of the shares of Swiss pesticides and seeds giant Syngenta (SYENF) have been tendered in favor of the \$43 billion acquisition.
[READ MORE >](#)

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- DASHBOARD
- TEAM
- ACCOUNTS
- EXT. ACCTS.
- PLANNING
- MY ADVICE ARCHITECT
- MY VAULT
- DECIPHER
- DISCLOSURES
- HELP

LABEL / DASHBOARD

Net Worth

▲ 4.5% YTD CHANGE

\$5,345,000

INVESTMENTS \$3.85m ASSETS \$2.1m LIABILITIES \$510k

[VIEW PORTFOLIO](#)

Financial Plan

75% Probability of Success

Your Financial Plan is within the Confidence Zone!

[PLAY ZONE](#) [SNAPSHOT](#)

Decipher™

Curious to learn how you really feel about investing?

Answer a few simple questions, and watch a short video. We capture your emotional response, and provide you with a personalized report

[TRY IT NOW](#)

Investment Accounts

SHOWING 5 OF 8 CONNECTED ACCOUNTS

TOTAL NET \$3,850,00

Fidelity Brokerage	\$425,984
MyAdviceArchitect Brokerage	\$584,759
Vanguard 401(k)	\$759,648
TD Ameritrade ETF	\$599,147
Fidelity Roth IRA	\$1,235,542

[VIEW ALL ACCOUNTS >](#)

Investment Allocation

PORTFOLIO RISK Aggressive 2017 GROWTH \$345,781 TOTAL NET \$3,850,00 YTD CHANGE ▲ 4.5%

8.2% BLENDED GROWTH

EQUITIES	35%
BONDS	21%
FIXED ANNUITIES	15%
VARIABLE ANNUITIES	8%
LIFE INSURANCE	6%
MUTUAL FUNDS	5%
CDS	5%
CASH & CASH EQUIVALENT	5%

External Accounts

SHOWING 5 OF 8 CONNECTED ACCOUNTS

TOTAL NET \$486,121 [VIEW ALL ACCOUNTS >](#)

Joint Checking Account	\$154,034
Joint Savings Account	\$352,984
American Express Card	\$5,434
Home Mortgage	\$504,566
Joint Money Market	\$489,103

Have more accounts? Add them now! [ADD ACCOUNT](#)

HAS YOUR SITUATION CHANGED?

It's important to meet regularly with your financial advisors to gauge where you are and what you need to do as you pursue your financial goals.

A lot can happen in a year. You may find that your job, family situation, financial position or current market conditions make now a good time to review your investments.

Contact your financial advisor to schedule an appointment at your earliest convenience!

[CONTACT YOUR ADVISOR NOW](#)

LABEL / **DASHBOARD**

Net Worth

▲ 4.5% YTD CHANGE

\$5,345,000



● INVESTMENTS \$3.85m ● ASSETS \$2.1m ● LIABILITIES \$510k

[VIEW PORTFOLIO](#)

Financial Plan



Probability of Success

Your Financial Plan is within the Confidence Zone!

[VIEW PORTFOLIO](#)

[VIEW PORTFOLIO](#)

Credit Score

POWERED BY CREDIT SESAME

751 / 850 ▲ 5 pt

My Score Is Excellent!



TOTAL DEBT \$346,783 MONTHLY PAYMENT \$2,532 DEBT RATIO 16%

[GET FULL CREDIT REPORT](#)

Investment Accounts

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[VIEW PORTFOLIO](#)

Advisor Stream

THE LATEST FINANCIAL NEWS



How do I know what to invest in?

MONDAY, AUGUST 14, 2017 - CNN MONEY

You're not the only one feeling overwhelmed by the tens of thousands of stocks, bonds, mutual funds and exchange-traded funds out there. A lot of young people who are new to the investing game feel so intimidated by all the choices, that they shy away from investing altogether.

[READ MORE >](#)



Why You Need Stocks In Your Portfolio

WEDNESDAY, AUGUST 16, 2017 - FORBES

The level of stocks in your portfolio when you retire is key to whether you have enough money. Too much in stocks leaves you vulnerable to market slumps. Too little means scant growth, and inflation can hurt your holdings badly.

[READ MORE >](#)



Investing Short-Term When Stocks Are High?

TUESDAY, AUGUST 15, 2017 - NEW YORK TIMES

Given how little anyone can know about what will end the bull market and when, most people should try to avoid making predictions, let alone investing based on them.

[READ MORE >](#)



Savings or Roth IRA: Which Is Better for You?

THURSDAY, AUGUST 10, 2017 - INVESTOPEDIA

Interest rates are low, probably the lowest you've ever seen in your lifetime. This leaves a lot of people wondering how they can do better with their savings.

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HAVE QUESTIONS OR NEED ASSISTANCE?

Our team of professionals are here to help. Whether you have a simple question about an investment or would like to schedule some time to discuss a planning need, it's always easy to get in contact with the First Financial team. Click below to chat or schedule an appointment!



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