

U.S Stocks Edge Lower, but on Pace for Weekly Gain

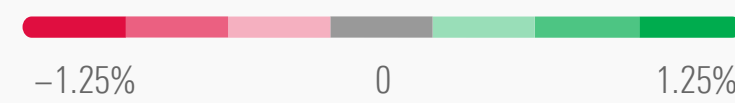
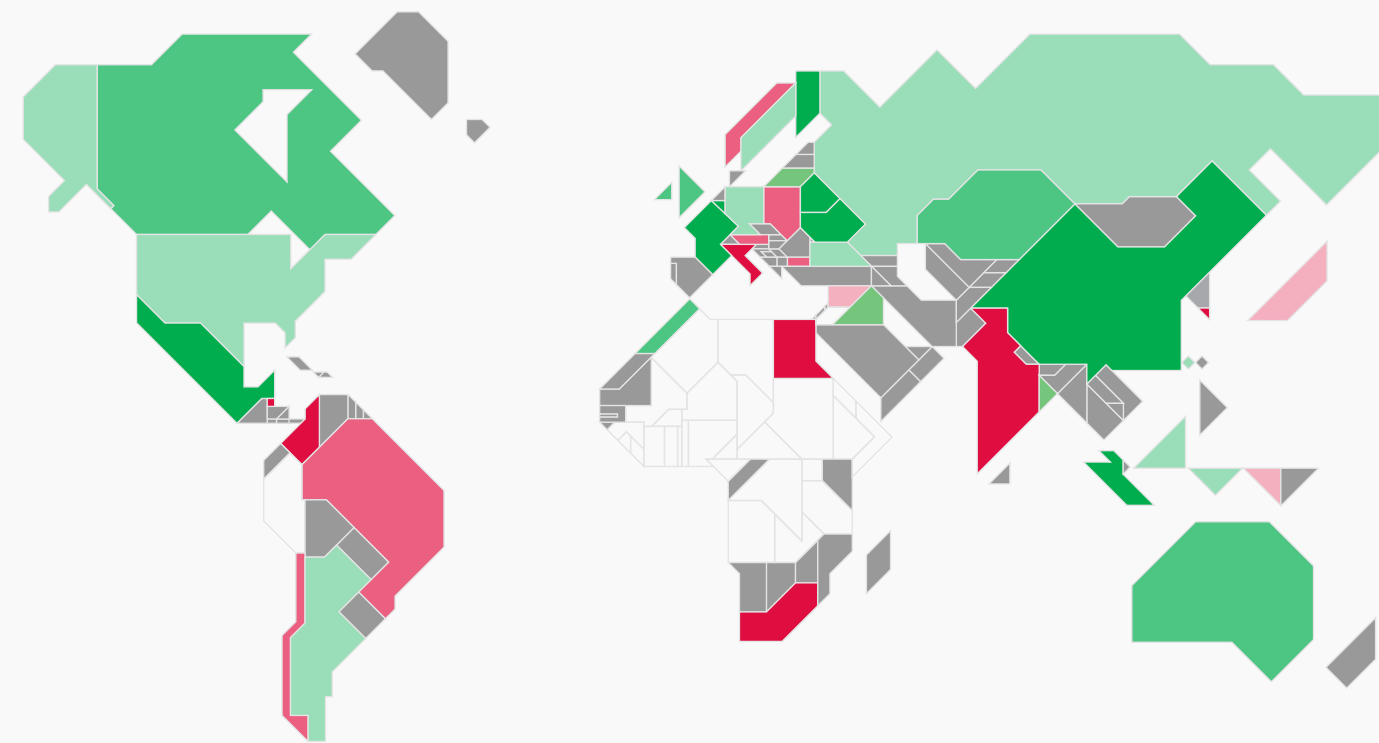
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Global Market Barometer

7 Aug 2014 4:00 PM EST

1D 3M YTD 1Y 5Y 10Y



U.S Stocks Edge Lower, but on Pace for Weekly Gain

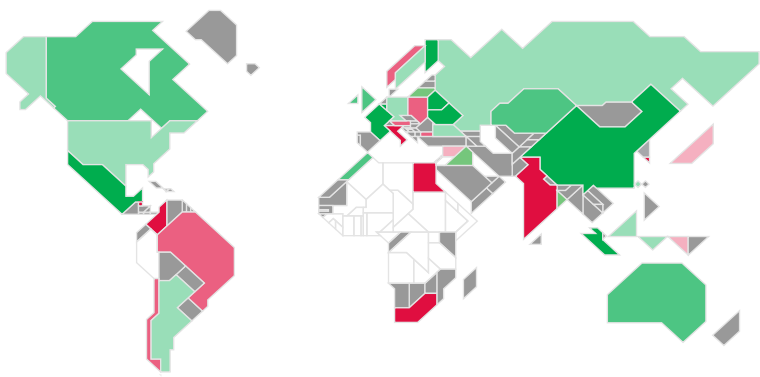
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Sign In

Global Market Barometer

7 Aug 2014 4:00 PM EST

☰ 1Y

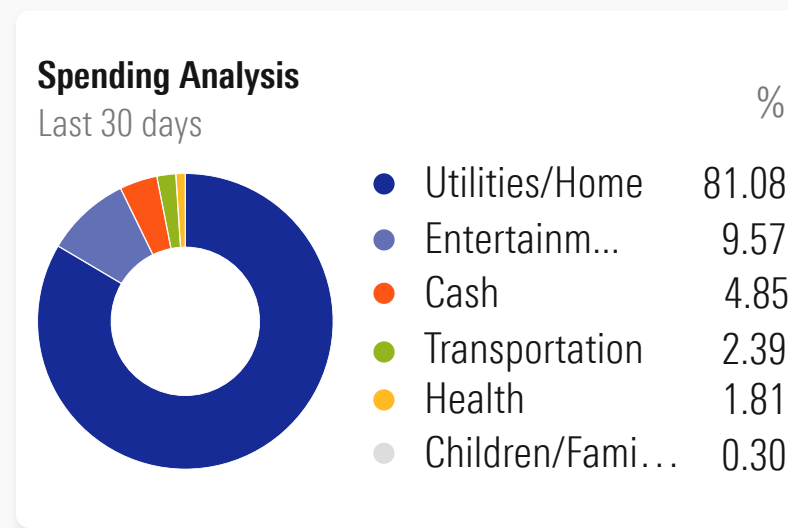
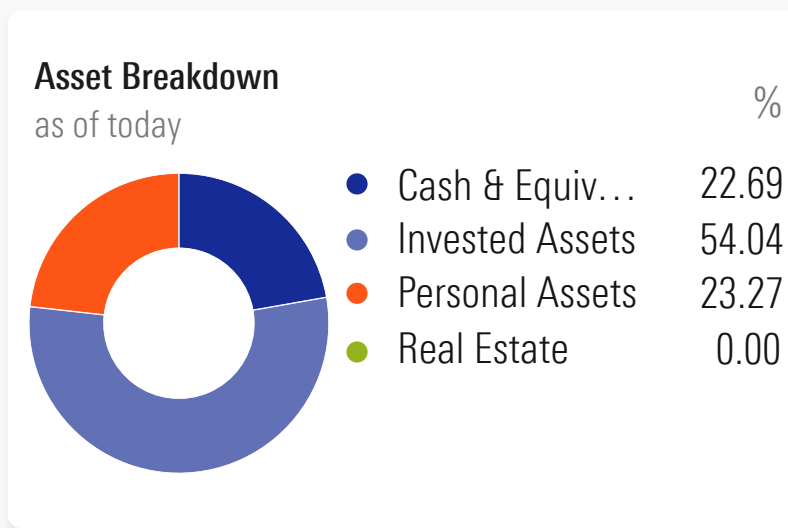
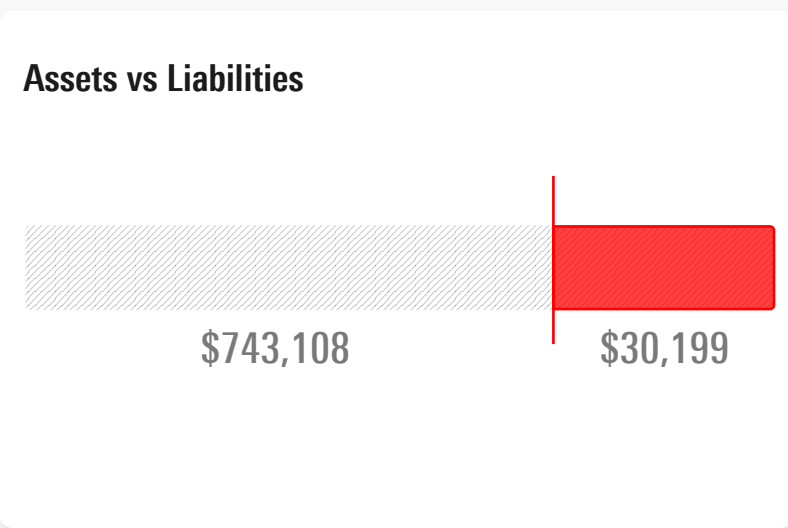


You currently don't have any accounts

To have a better understanding of your net worth, please add an account.

Add Account

NET WORTH
↑
\$712,909



Welcome, Ivan! Your investment accounts have been added by your advisor. You can also add your personal accounts and get a better picture of your total net worth. Close ×

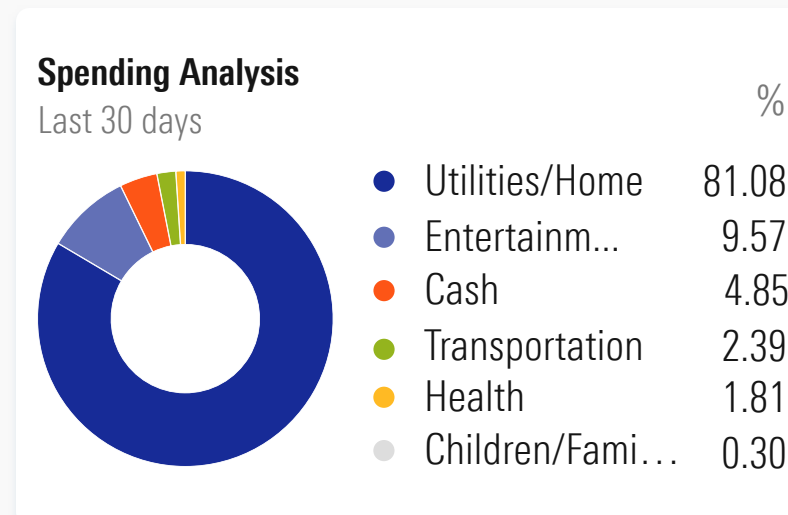
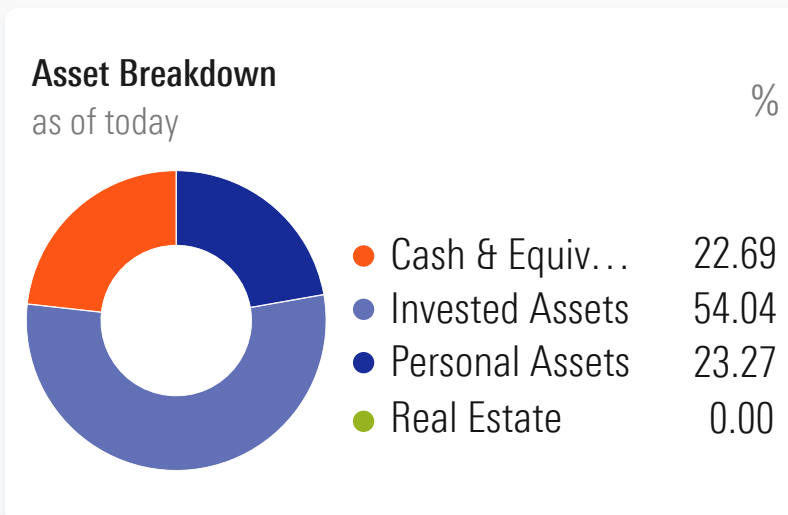
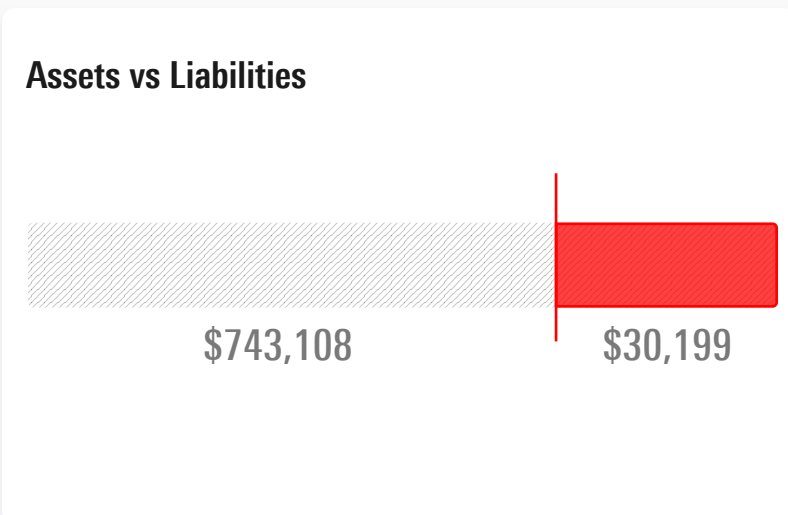
HOLDINGS

Add Account

- All
- Investments
- Banking
- Personal Property
- Liabilities
- Health

Value	Name	Bank/Custodian	Type
\$91,633	Roth IRA	Charles Schwab	Advised Assets >
\$41,213	Timmy 529	Bright Directions	Advised Assets >

NET WORTH
↑
\$712,909



HOLDINGS

Add Account

- All**
- Investments
- Banking
- Personal Property
- Liabilities
- Health

Value	Name	Bank/Custodian	Type
\$91,633	Roth IRA	Charles Schwab	Advised Assets
\$41,213	Timmy 529	Bright Directions	Advised Assets
\$73,205	Work Health Saving...	Fifth Third	Investments/Other
\$32,644	Discretionary Fund...	Fidelity	Investments/Other
-\$285,491	Mortgage	PNC Bank	Liabilities
-\$13,024	Home Equity Line	Wells Fargo	Liabilities
-\$5,482	United MileagePlus...	Chase	Liabilities
-\$19,308	CBIC Checking	CIBC	Liabilities
\$0	American Express...	American Express	Liabilities
\$180,000	2002 Catalina 400...	-	Other Assets
\$114,000	1987 Ferrari Testarossa	-	Other Assets



NET WORTH

\$712,909

Investments & Other Accounts
Last 12 months

- 1 Day
- 1 Month
- 3 Month
- 6 Month
- 1 Year
- 2 Year

Start 1/1/2015
\$362,210

End 1/1/2016
\$362,210

High
\$362,210

Low
\$362,210

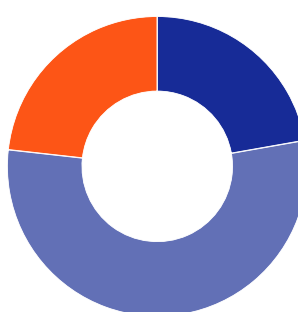


Assets vs Liabilities



Asset Breakdown

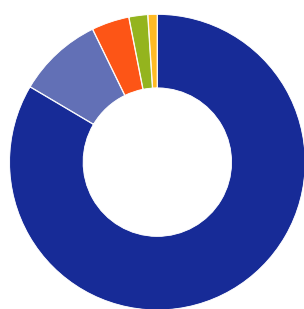
as of today



	%
● Cash & Equivalent	22.69
● Invested Assets	54.04
● Personal Assets	23.27
● Real Estate	0.00

Spending Analysis

Last 30 days



	%
● Utilities/Home	81.08
● Entertainment & Restaur...	9.57
● Cash	4.85
● Transportation	2.39
● Health	1.81
● Children/Family	0.30

HOLDINGS

Add Account

All

Investments

Banking

Personal Property

Liabilities

Health

Value	Name	Bank/Custodian	Type	
\$91,633	Roth IRA	Charles Schwab	Advised Assets	>
\$41,213	Timmy 529	Bright Directions	Advised Assets	>
\$73,205	Work Health ...	Fifth Third	Investments/Other	>
\$32,644	Discretionary ...	Fidelity	Investments/Other	>
-\$285,491	Mortgage	PNC Bank	Liabilities	>
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\$0	American Ex...	American Express	Liabilities	>
\$180,000	2002 Catalina...	-	Other Assets	>
\$114,000	1987 Ferrari...	-	Other Assets	>

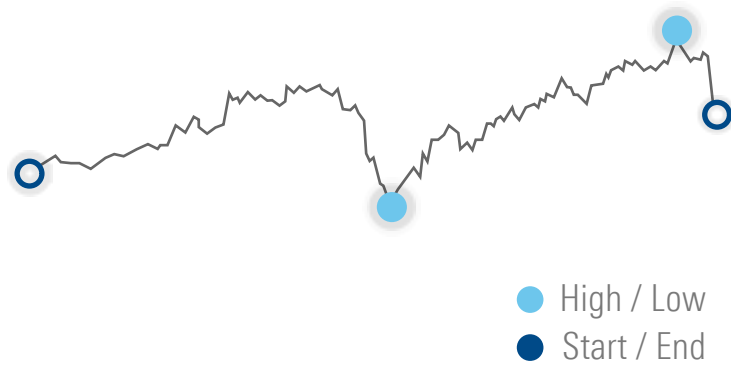
NET WORTH

\$712,909

Investments & Other Accounts

Last 12 months

1 Year



Assets vs Liabilities

Asset Breakdown

Spending Analysis

Assets vs Liabilities



HOLDINGS

Add Account

All

\$91,633 Roth IRA | Charles Schwab

\$41,213 Timmy 529 | Bright Directions

\$73,205 Work Health... | Fifth Third

\$32,644 Discretionary Fund... | Fidelity

-\$285,491 Mortgage | PNC Bank

-\$13,024 Home Equity Line | Wells Fargo

-\$5,482 United MileagePlus... | Chase

-\$19,308 CIBC Checking | CBIC

\$0 American Express... | AMEX

\$180,000 2002 Catalina 400...

\$114,000 1987 Ferrari Testarossa

CONTACT ADVISOR





Net Worth

Documents

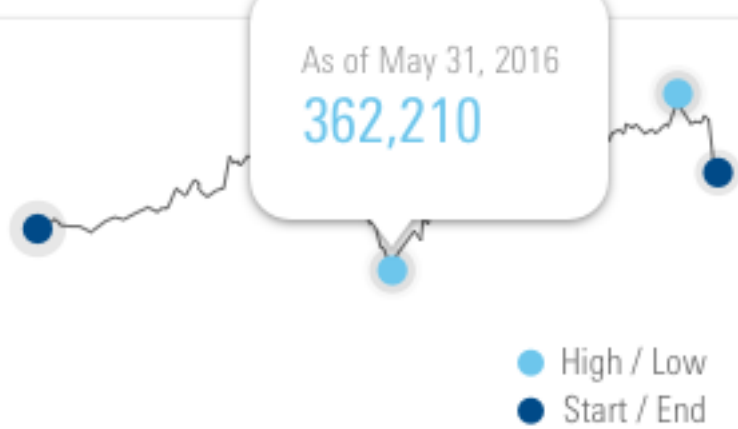
2

Sign Out

Investments & Other Accounts

Last 12 months

12 Months

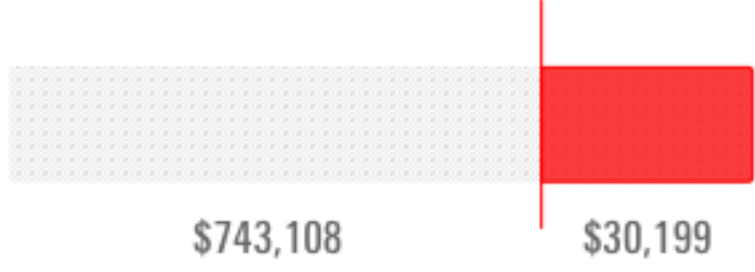


Assets vs Liabilities

Asset Breakdown

Spending Analysis

Assets vs Liabilities



HOLDINGS

Add Account

All



\$91,633	Roth IRA Charles Schwab	>
\$41,213	Timmy 529 Bright Directions	>
\$73,205	Work Health... Fifth Third	>
\$32,644	Discretionary Fund... Fidelity	>
-\$285,491	Mortgage PNC Bank	>
-\$13,024	Home Equity Line Wells Fargo	>
-\$5,482	United MileagePlus... Chase	>
-\$19,308	CIBC Checking CBIC	>
\$0	American Express... AMEX	>
\$180,000	2002 Catalina 400...	>
\$114,000	1987 Ferrari Testarossa	>

CONTACT ADVISOR

ADD YOUR ACCOUNTS



Search for your bank

+ Manual Account

QUICK SEARCH:



Bank of America



CHASE



citi

SUNTRUST

Capital One

Your information is secure

We employ bank level security to protect your privacy.

Done

Cancel


EDIT YOUR INVESTMENTS/OTHER



Last Updated Yesterday

Nickname

Account Sub-type

Include in Budget?

Include transactions from this account in spending calculations

Save

Cancel Disconnect Account

CONFIRM DISCONNECT

Would you like to disconnect this account and keep it in Lorem Ipsum;
or completely delete this account and its data from Lorem Ipsum?

Disconnect Account

Delete Account

CONFIRMATION

Are you sure you want to delete this account?

Yes

Cancel

ENTER YOUR CREDENTIALS



Discover Card

www.discovercard.com

User ID

ivan-crandall@freewebmail.com

•••••

Your information is secure

We employ bank level security to protect your privacy.

Submit

Go Back



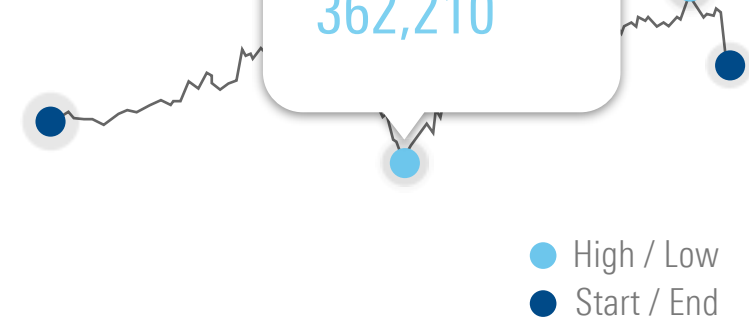
NET WORTH

\$712,909

Investments & Other Accounts

Last 12 months

12 Months ▼



Assets vs Liabilities

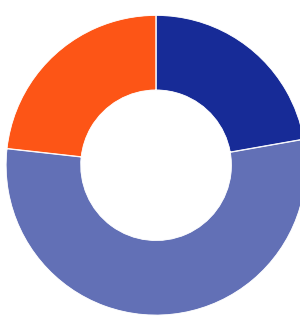
Asset Breakdown

Spending Analysis

Asset Breakdown

as of today

%



- Cash & Equivalent 22.69
- Invested Assets 54.04
- Personal Assets 23.27
- Real Estate 0.00

HOLDINGS

Add Account

All ▼

- All
- Banking
- Health
- Investments
- Liabilities
- Personal Property

\$73,205 Work Health... | Fifth Third Investments >

\$32,644 Discretionary Fund... | Fidelity Investments >

-\$285,491 Mortgage | PNC Bank Liabilities >

-\$13,024 Home Equity Line | Wells Fargo Liabilities >

-\$5,482 United MileagePlus... | Chase Liabilities >

-\$19,308 CIBC Checking | CBIC Liabilities >

\$0 American Express... | AMEX Liabilities >

\$180,000 2002 Catalina 400... | Personal Property >

\$114,000 1987 Ferrari Testarossa | Personal Property >

CONTACT ADVISOR

ADD YOUR ACCOUNTS

BANK CONNECTION PROGRESS

Feel Free to add you accounts from another bank on the left or click "Done" below if you're done adding accounts for now.

Discover Card

Your accounts are loading...



Your information is secure

We employ bank level security to protect your privacy.

Done

ADD YOUR ACCOUNTS

 Search for your bank

+ Manual Account

QUICK SEARCH:



Your information is secure
We employ bank level security to protect your privacy.

Done

Cancel

ADD YOUR ACCOUNTS

+ Manual Account

Discover Card

www.discovercard.com

Discover Financial Services

www.discoverbank.com

Discover Bank Student Loans

www.discoverstudentloans.com

Discover Bank

www.discoverbank.com

Discover benefits Central

resources.hewitt.com

Your information is secure

Lorem ipsum employs bank level security to protect your privacy.

Done

Cancel

ENTER YOUR CREDENTIALS



Discover Card
www.discovercard.com

User ID

ivan-crandall@freewebmail.com

.....

Your information is secure
We employ bank level security to protect your privacy.

Submit

Go Back

ADD YOUR ACCOUNTS

+ Manual Account

QUICK SEARCH:



Your information is secure
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ADD YOUR ACCOUNTS

+ Manual Account

QUICK SEARCH:



Your information is secure
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Done

BANK CONNECTION PROGRESS

Feel Free to add you accounts from another bank on the left or click "Done" below if you're done adding accounts for now.

Discover Card



Discover

-\$7845.21

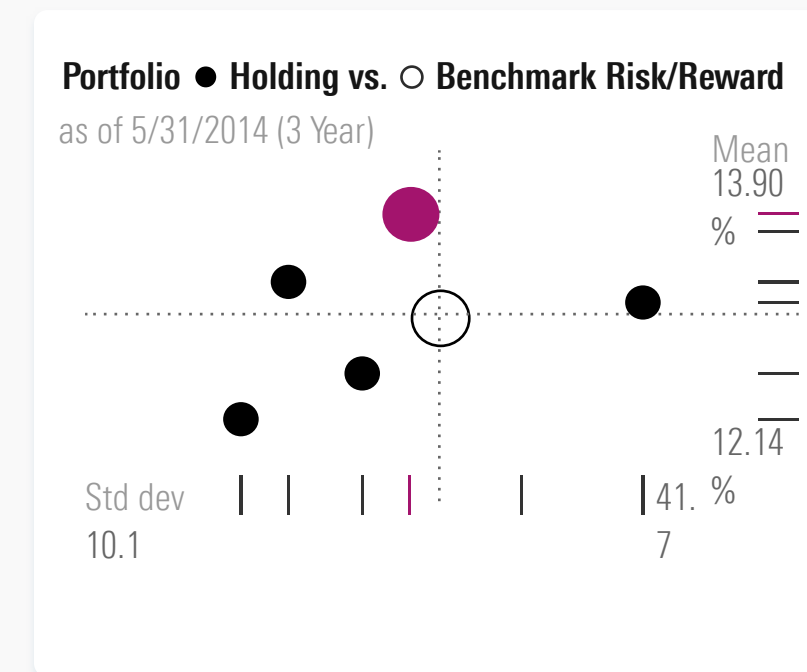
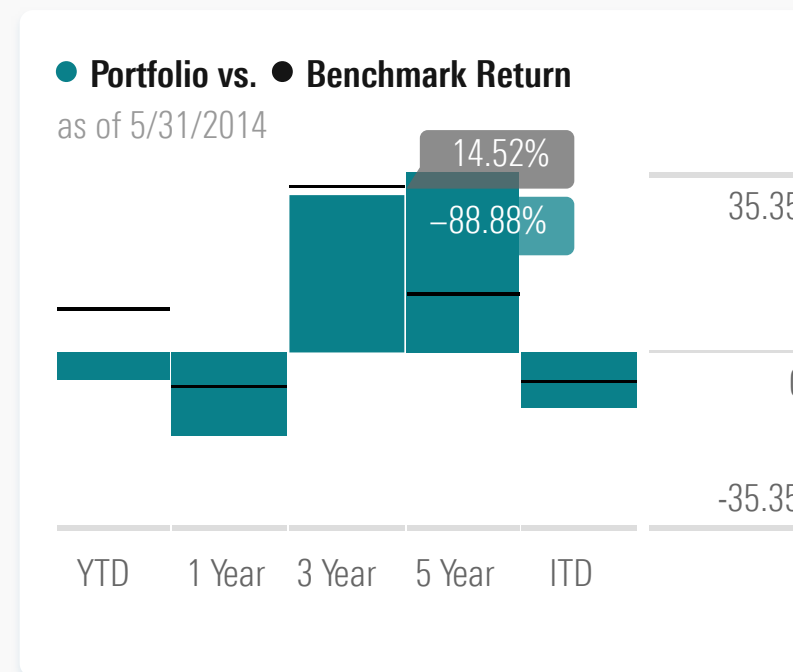
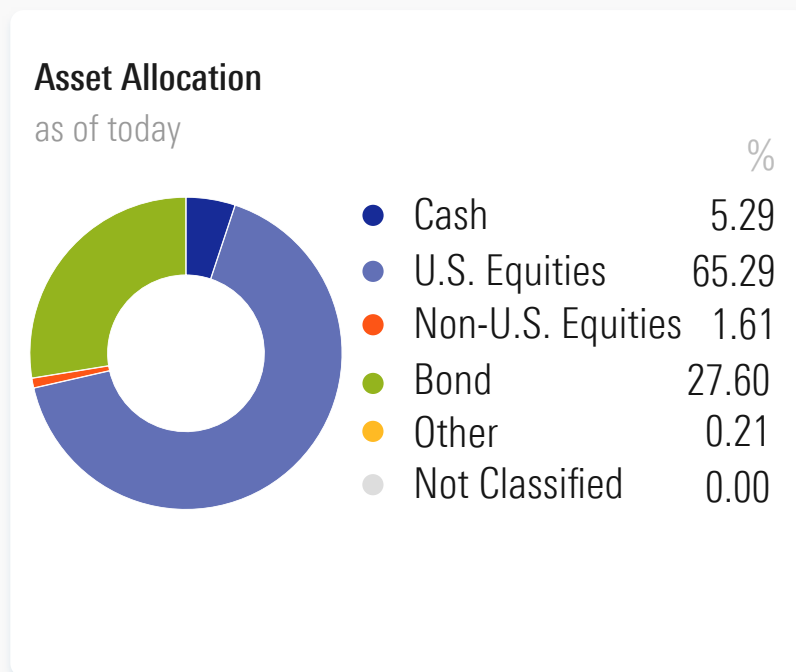
\$32,644

DISCRETIONARY FUND - FIDELITY

General account for emergency cash access

Edit Account

Net Worth > [Discretionary Fund](#)



Holdings

Value	Name	Type	Price	Change \$ as of yesterday	Change %	
\$11,000	Default Cash	Money Market	\$1.00	–	–	>
\$5,601	Fidelity California Municipal Income	Money Market	\$13.45	\$0.00	0.00	>
\$2,401	Royce Total Return Investment Fund	Mutual Fund	\$13.50	\$0.08	0.60	>
\$1,502	Apple, Inc.	Stock	\$108.08	\$0.15	0.14	>
\$5,491	General Electric Co.	Stock	\$31.21	-\$0.08	0.26	>

\$32,644

DISCRETIONARY FUND - FIDELITY

General account for emergency cash access

Edit Account

Net Worth > Discretionary Fund

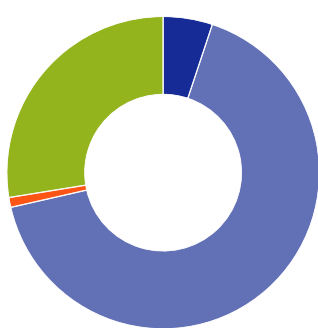
Asset Allocation

Portfolio vs Bench...

Portfolio Holding vs Bench...

Asset Allocation

as of today



	%
Cash	5.29
U.S. Equities	65.29
Non-U.S. Equities	1.61
Bond	27.60
Other	0.21
Not Classified	0.00

HOLDINGS

\$11,000	Default Cash	>
\$5,601	Fidelity California Municipal...	>
\$2,401	Royce Total Return Investme...	>
\$1,502	Apple, Inc.	>
\$5,491	General Electric Co.	>

CONTACT ADVISOR


\$285,491

MORTGAGE - PNC BANK
Lorem ipsum dolor sit amet cons

[Edit Account](#)

Net Worth > [Mortgage](#)

Date	Description	Category	Net Amount
08/01/16	State Farm Insurance	Insurance/Home	-\$45.58
08/01/16	Loan Payment	Loan Payments	\$713.32
08/01/16	Private Mortgage Insurance	Insurance/Home	\$95.77
07/01/16	State Farm Insurance	Insurance/Home	-\$45.58
07/01/16	Loan Payment	Loan Payments	\$713.32
07/01/16	Private Mortgage Insurance	Insurance/Home	\$95.77
06/01/16	State Farm Insurance	Insurance/Home	-\$45.58
06/01/16	Loan Payment	Loan Payments	\$713.32
06/01/16	Private Mortgage Insurance	Insurance/Home	\$95.77
05/01/16	State Farm Insurance	Insurance/Home	-\$45.58
05/01/16	Loan Payment	Loan Payments	\$713.32

 Loading more...

\$1,502

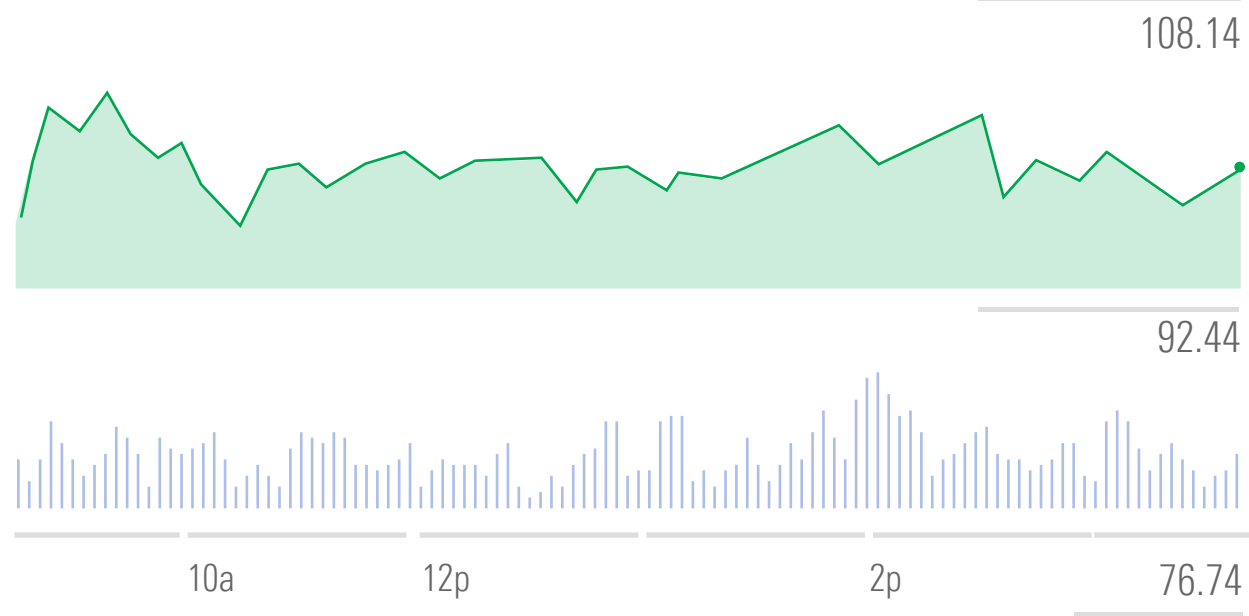
APPLE INC, APPL | ★★★★★

Net Worth > Discretionary Fund > [Apple Inc, APPL](#)

Market Closed

- Quote
- Key Stats
- News

\$108.85 ↑ 0.34 | 0.31%



USD | NASDAQ national market | As of 23 Aug 2016 3:30 PM EST | BATS Real-Time Price

Bid
108.80x2,300

Ask
108.93x800

Day Range
108.53 – 109.32

Volume / Avg
21.3 Mil / 33.8 Mil

Year Range
89.47 – 123.82

Dividend Yield
2.01%

Market Cap
586.5320 Bil

Investment Style
Large Blend

Price / Sales
2.74

Price / Earnings
12.63

Forward P / E
12.09

Price / Book
4.62

\$19,308

CIBC CHECKING - CIBC BANK
Main personal checking account

Edit Account

Net Worth > [CBIC Checking](#)

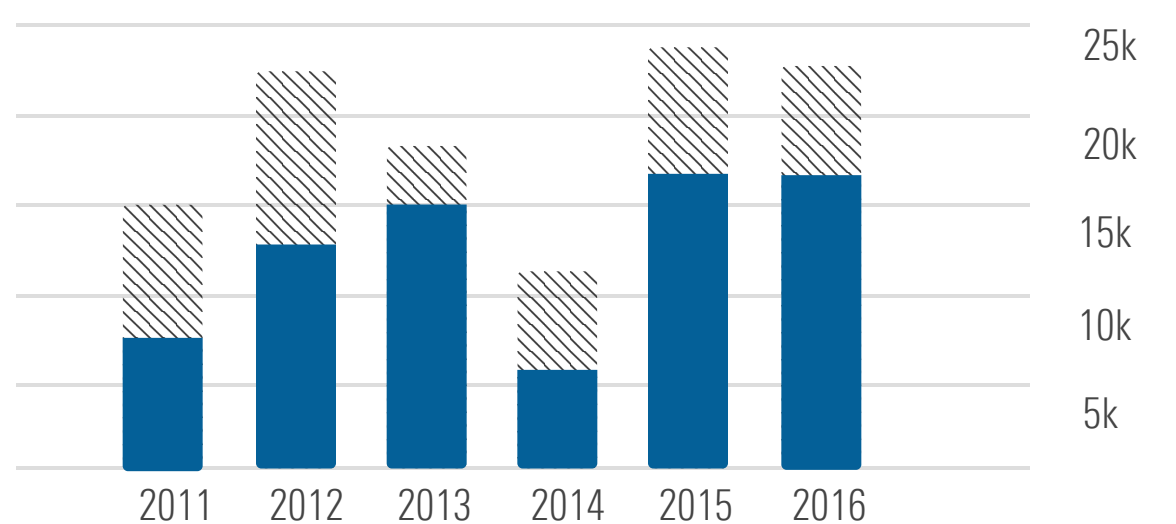
Asset Allocation

as of today



Restaurants / Bars	41.35%
Groceries	38.65%
CD	17.15%
Cash	2.41%
Other	2.00%
Not classified	0.44%

Credits vs Debits



 You have [1] uncategorized transaction

Close ×

Date	Description	Category	Amount	Balance
8/24/16	M BURGER THOMPSON	Car / Transportation	-\$5.06	\$19,308
8/24/16	ORGANIC LIFE LLC	Restaurants / Bars	-\$6.49	\$19314.49
8/22/16	ABM PARKING HURON LOT 1 CHICAGOIL	Groceries	-\$15.60	\$19330.09
8/22/16	RED HEN BREAD - OAK PAR OAK PARKIL	Groceries	-\$3.50	\$19333.59
8/19/16	LA COCINA MEXICAN GRIL	Restaurants / Bars	-\$6.99	\$19340.58
8/18/16	Check 469	CHECK	-\$600.00	\$19940.58
8/17/16	ORGANIC LIFE LLC	Restaurants / Bars	-\$6.49	\$19947.07
8/15/16	ABM PARKING HURON LOT 1 CHICAGOIL	Car / Transportation	-\$15.60	\$19962.67
8/15/16	Super Tech Consultancy, LLC	Paycheck	4,875.23	\$24837.90
8/15/16	ONLINE PAYMENT TO COMMONWEALTH EDISON	UNCATEGORIZED	-\$114.26	\$19962.90
8/15/16	SHAKE SHACK	Restaurants / Bars	-\$20.25	\$19983.15

< 3 of 10 >

\$19,308

CIBC CHECKING - CIBC BANK

Main personal checking account

Edit Account

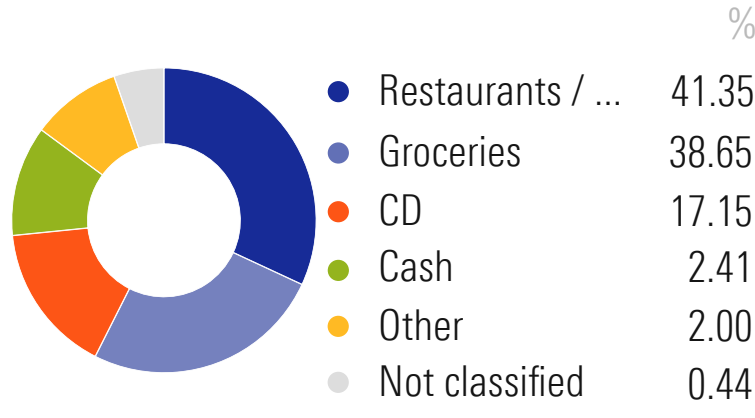
Net Worth > CIBC Checking

Asset Allocation

Credits vs Debits

Asset Allocation

as of today



You have [1] uncategorized transaction

Close x

+	8/24/16 M BURGER THOMPSON	-\$5.06 \$19,308
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+	8/24/16 M BURGER THOMPSON	-\$5.06 \$19,308
+	8/24/16 M BURGER THOMPSON	-\$5.06 \$19,308
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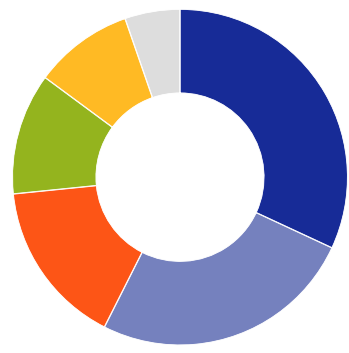
\$19,308

CIBC CHECKING - CIBC BANK
Main personal checking account

Edit Account

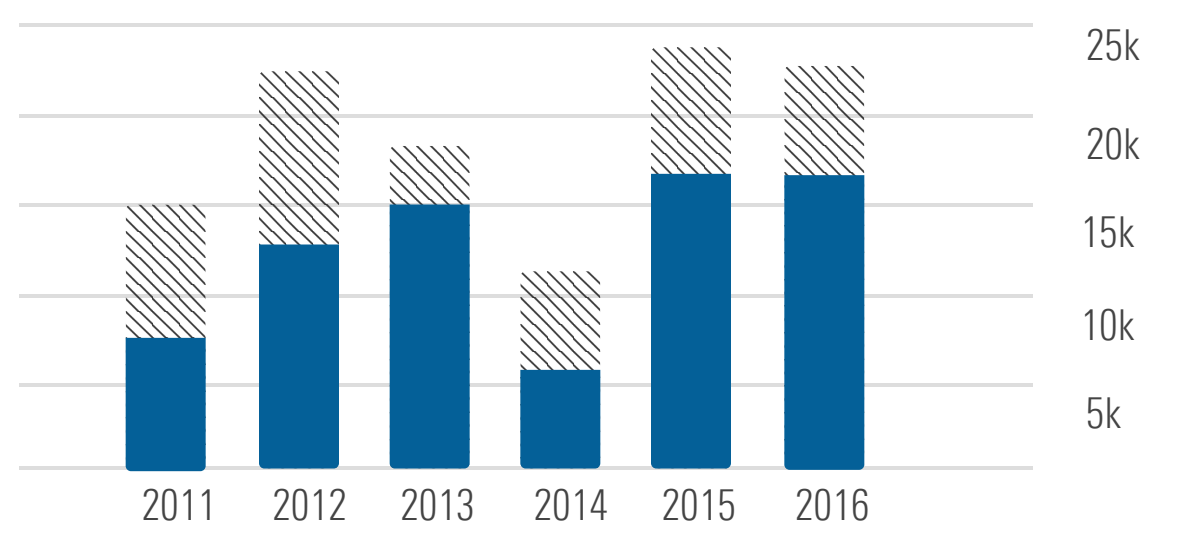
Net Worth > [CBIC Checking](#)

Asset Allocation as of today



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Credits vs Debits



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Close ×

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8/17/16	ORGANIC LIFE LLC	Restaurants / Bars	-\$6.49	\$19947.07
8/15/16	ABM PARKING HURON LOT 1 CHICAGOIL	Car / Transportation	-\$15.60	\$19962.67
8/15/16	Super Tech Consultancy, LLC	Paycheck	4,875.23	\$24837.90
8/15/16	ONLINE PAYMENT TO COMMONWEALTH EDISON	UNCATEGORIZED	-\$114.26	\$19962.90
8/15/16	SHAKE SHACK	Bills	-\$20.25	\$19983.15

- Bills**
- Cable / Internet / Phone
- Insurance
- Loan Payments
- Mortgage / Rent
- Other Bills
- Taxes
- Utilities

 Loading more...

\$19,308

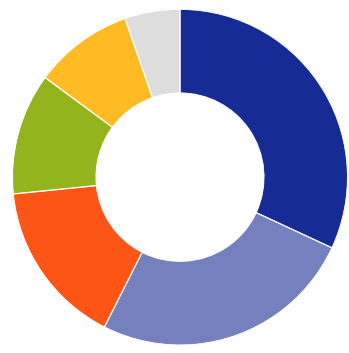
CIBC CHECKING - CIBC BANK
Main personal checking account

Edit Account

Net Worth > [CBIC Checking](#)

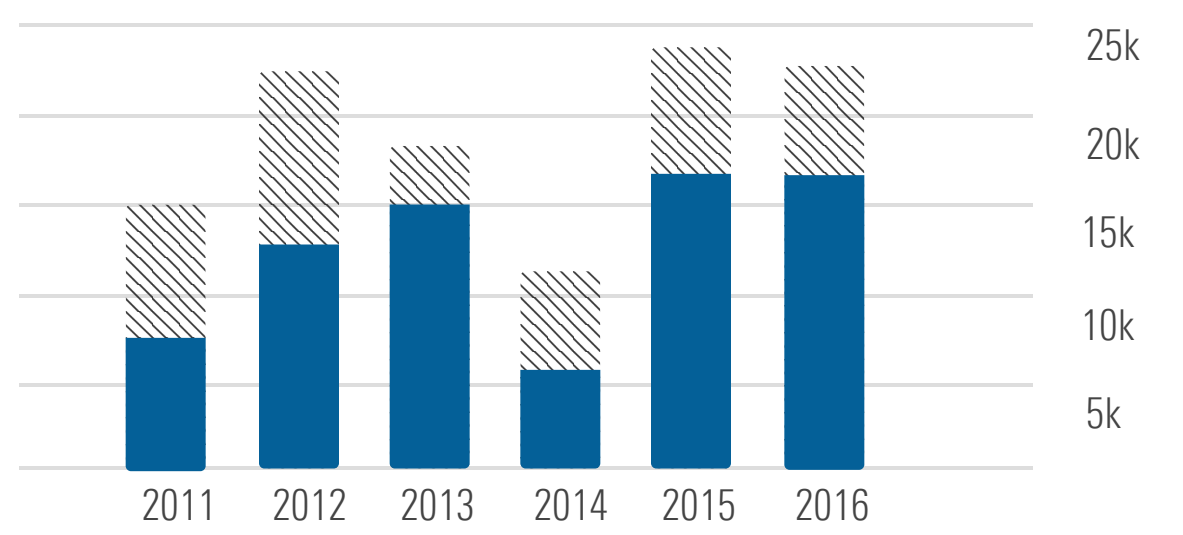
Asset Allocation

as of today




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8/15/16	ABM PARKING HURON LOT 1 CHICAGOIL	Car / Transportation	-\$15.60	\$19962.67
8/15/16	Super Tech Consultancy, LLC	Paycheck	4,875.23	\$24837.90
8/15/16	ONLINE PAYMENT TO COMMONWEALTH EDISON	Utilities 	✓ ✗ -\$114.26	\$19962.90
8/15/16	SHAKE SHACK	Restaurants / Bars	-\$20.25	\$19983.15

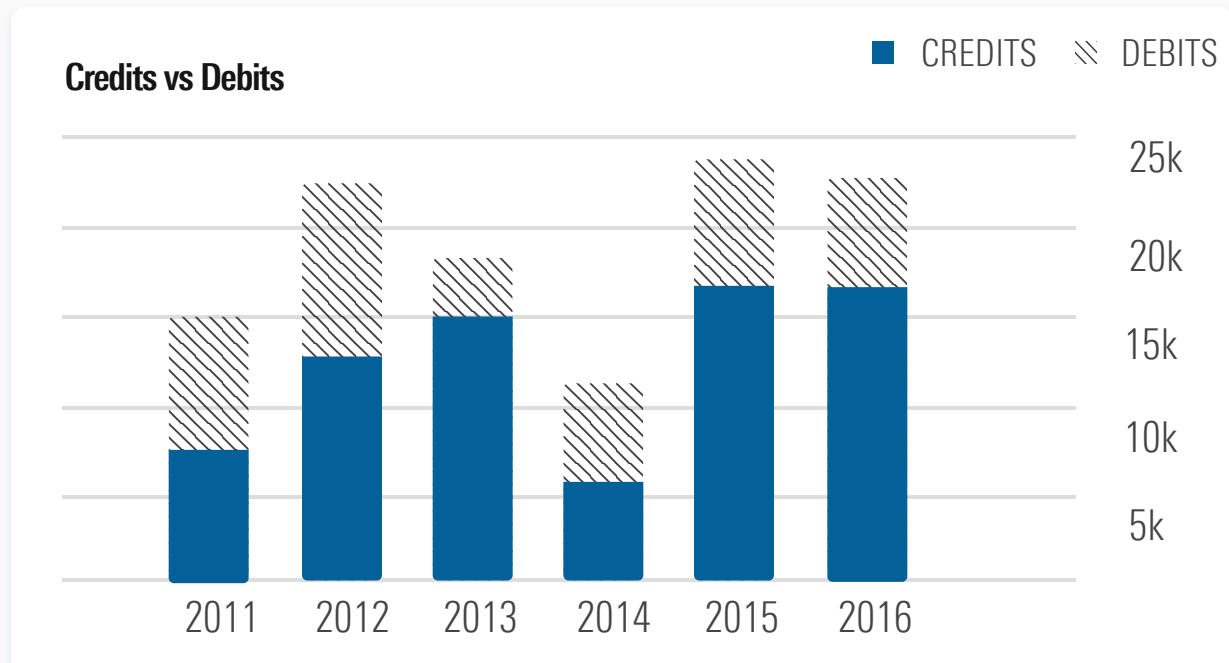
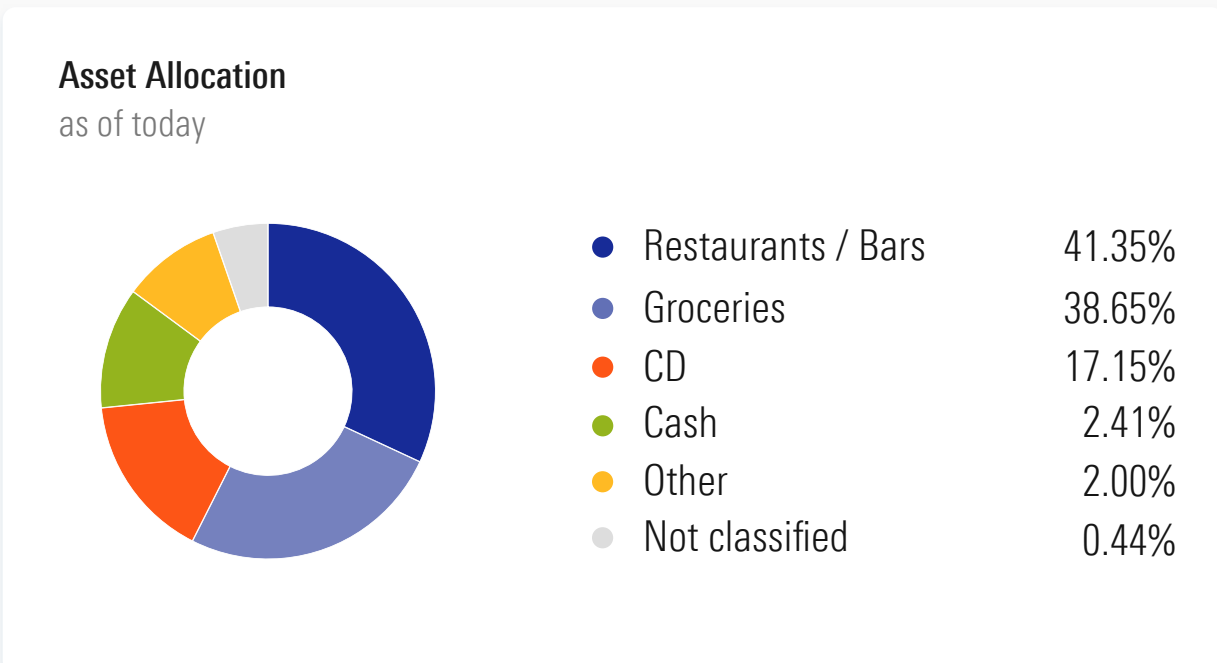
 Loading more...

\$19,308

CIBC CHECKING - CIBC BANK
Main personal checking account


Edit Account

Net Worth > [CBIC Checking](#)



✓ Your changes have been saved Close ×

Date ▾	Description	Category	Amount	Balance
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8/18/16	Check 469	CHECK	-\$600.00	\$19940.58
8/17/16	ORGANIC LIFE LLC	Restaurants / Bars	-\$6.49	\$19947.07
8/15/16	ABM PARKING HURON LOT 1 CHICAGOIL	Car / Transportation	-\$15.60	\$19962.67
8/15/16	Super Tech Consultancy, LLC	Paycheck	4,875.23	\$24837.90
8/15/16	ONLINE PAYMENT TO COMMONWEALTH EDISON	Utilities	-\$114.26	\$19962.90
8/15/16	SHAKE SHACK	Restaurants / Bars	-\$20.25	\$19983.15

 Loading more...

\$19,308

CIBC CHECKING - CIBC BANK

Main personal checking account

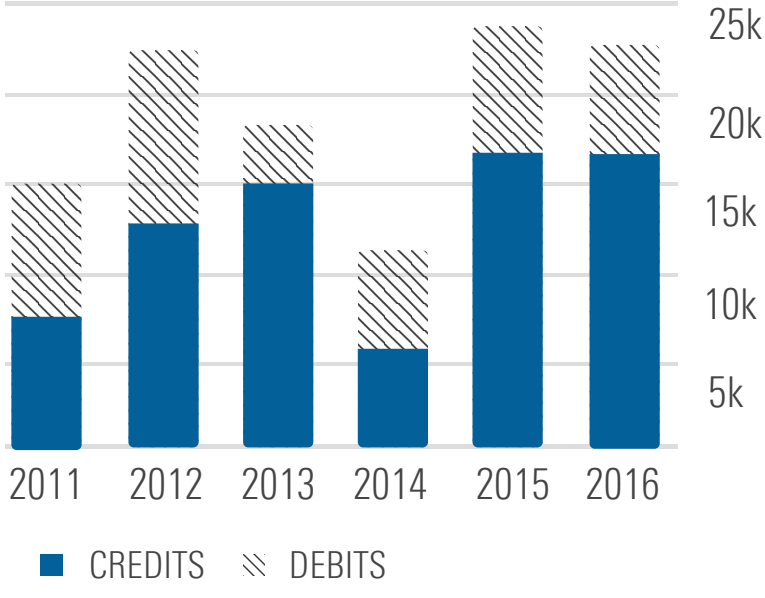
Edit Account

Net Worth > CIBC Checking

Asset Allocation

Credits vs Debits

Credits vs Debits



You have [1] uncategorized transaction

Close X



8/24/16
M BURGER THOMPSON

-\$5.06
\$19,308



8/24/16
M BURGER THOMPSON

-\$5.06
\$19,308



8/24/16
M BURGER THOMPSON

-\$5.06
\$19,308



8/24/16
M BURGER THOMPSON

-\$5.06
\$19,308



8/24/16
M BURGER THOMPSON

-\$5.06
\$19,308



8/24/16
M BURGER THOMPSON

-\$5.06
\$19,308



8/24/16
M BURGER THOMPSON

-\$5.06
\$19,308



8/24/16
M BURGER THOMPSON

-\$5.06
\$19,308



8/24/16
M BURGER THOMPSON

-\$5.06
\$19,308

UNCATEGORIZED



Bills

- Cable / Internet / Phone
- Insurance
- Loan Payments
- Mortgage / Rent
- Other Bills
- Taxes
- Utilities

-\$5.06
\$19,308



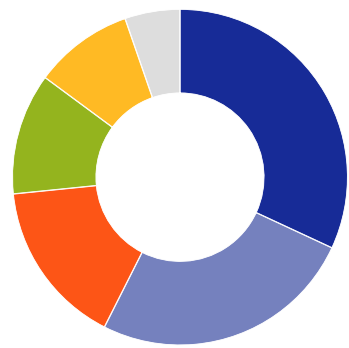
\$19,308

CIBC CHECKING - CIBC BANK
Main personal checking account

Edit Account

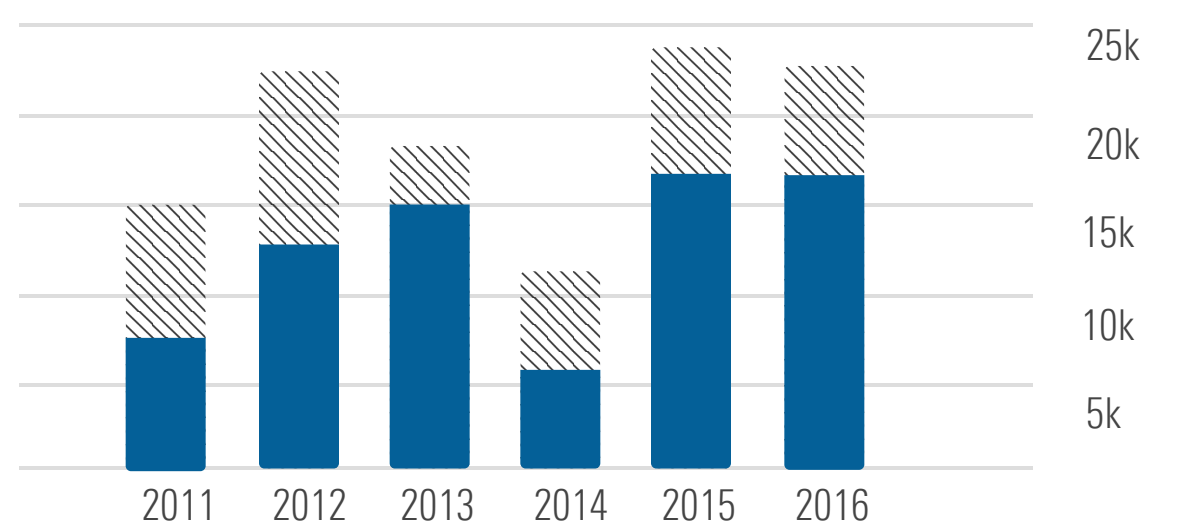
Net Worth > [CBIC Checking](#)

Asset Allocation as of today



Restaurants / Bars	41.35%
Groceries	38.65%
CD	17.15%
Cash	2.41%
Other	2.00%
Not classified	0.44%

Credits vs Debits



 You have [1] uncategorized transaction

Close ×

Date	Description	Category	Amount	Balance
8/24/16	M BURGER THOMPSON	Car / Transportation	-\$5.06	\$19,308
8/24/16	ORGANIC LIFE LLC	Restaurants / Bars	-\$6.49	\$19314.49
8/22/16	ABM PARKING HURON LOT 1 CHICAGOIL	Groceries	-\$15.60	\$19330.09
8/22/16	RED HEN BREAD - OAK PAR OAK PARKIL	Groceries	-\$3.50	\$19333.59
8/19/16	LA COCINA MEXICAN GRIL	Restaurants / Bars	-\$6.99	\$19340.58
8/18/16	Check 469	CHECK	-\$600.00	\$19940.58
8/17/16	ORGANIC LIFE LLC	Restaurants / Bars	-\$6.49	\$19947.07
8/15/16	ABM PARKING HURON LOT 1 CHICAGOIL	Car / Transportation	-\$15.60	\$19962.67
8/15/16	Super Tech Consultancy, LLC	Paycheck	4,875.23	\$24837.90
8/15/16	ONLINE PAYMENT TO COMMONWEALTH EDISON	UNCATEGORIZED	-\$114.26	\$19962.90
8/15/16	SHAKE SHACK	UNCATEGORIZED	-\$20.25	\$19983.15

- Utilities
- Transfer**
- Credit Card
- Payments
- Transfers
- Income**
- Income
- Reimbursements
- [Edit Categories](#)

 Loading more...

EDIT CATEGORIES

Close ×

BILLS

Cable / Internet / Phone
Insurance
Loan Payments
Mortgage / Rent

Other Bills
Taxes
Utilities

CUSTOM BILLS

[+ Add](#)

REGULAR EXPENSES

Bank Fees
Car / Transportation
Cash
Children / Family
Clothing
Coffee Shops

Donations
Education
Entertainment
Gifts
Groceries
Health

Home
Job Expenses
Personal Care
Restaurants / Bars
Travel
Uncategorized

CUSTOM REGULAR EXPENSES

[+ Add](#)

TRANSFERS

Credit Card Payments
Transfers

CUSTOM TRANSFERS

[+ Add](#)

INCOME

Income
Reimbursements

CUSTOM INCOME

[+ Add](#)

Done

EDIT CATEGORIES

Close ×

BILLS

Cable / Internet / Phone
Insurance
Loan Payments
Mortgage / Rent

Other Bills
Taxes
Utilities

CUSTOM BILLS

[Edit](#) | [Delete](#)

[+ Add](#)

REGULAR EXPENSES

Bank Fees
Car/Transportation
Cash
Children / Family
Clothing
Coffee Shops

Donations
Education
Entertainment
Gifts
Groceries
Health

Home
Job Expenses
Personal Care
Restaurants / Bars
Travel
Uncategorized

CUSTOM REGULAR EXPENSES

[+ Add](#)

TRANSFERS

Credit Card Payments
Transfers

CUSTOM TRANSFERS

[+ Add](#)

INCOME

Income
Reimbursements

CUSTOM INCOME

[+ Add](#)

Done

DELETE CUSTOM CATEGORY

By deleting a custom category you may be affecting your budget and your transactions list. Anything previously labeled **Lorem Ipsum** will be relabeled "Uncategorized".

Are you sure you still want to delete **Lorem Ipsum** ?

Delete

Cancel



Mr. Ivan Crandall

ivan-crandall@freewebmail.com | (608) 125-5730

[Change Password](#)

To change or add information please contact your advisor.

SALARY

\$78,000/year

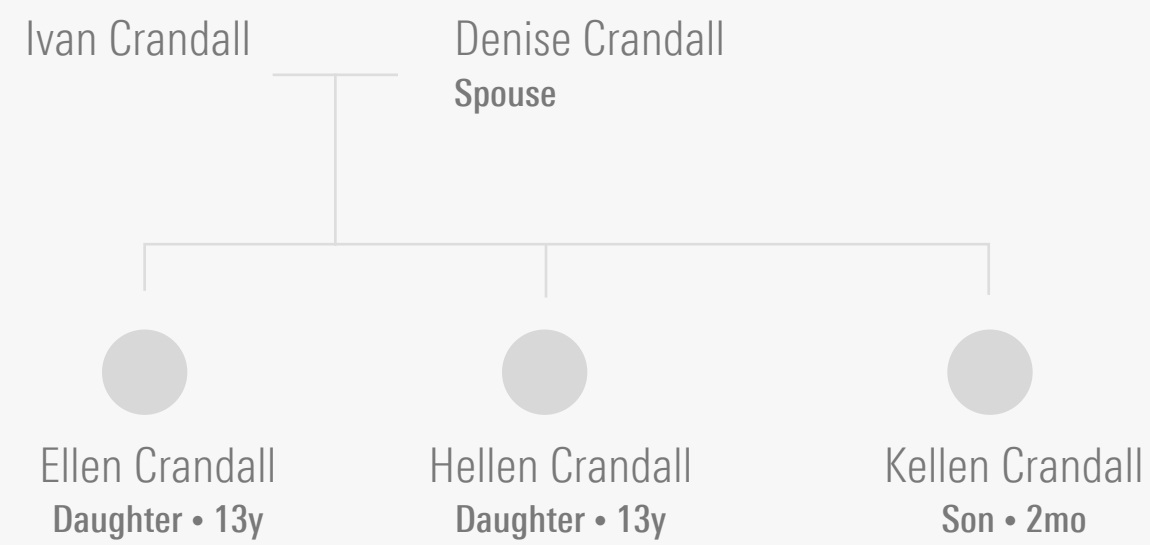
DATE OF BIRTH

July 12, 1975 (41 years)

ADDRESS

7745 Easy Barn Habroure, Hallelujah Junction, KS 20096-1100

FAMILY MEMBERS





Mr. Ivan Crandall

ivan-crandall@freewebmail.com

(608) 125-5730

[Change Password](#)

SALARY

\$78,000/year

DATE OF BIRTH

July 12, 1975 (41 years)

ADDRESS


7745 Easy Barn Habroure,
Hallelujah Junction, KS 20096-1100


FAMILY MEMBERS

Ivan Crandall

Denise Crandall

Spouse

 Ellen Crandall
Daughter • 13y

 Hellen Crandall
Daughter • 13y

 Kellen Crandall
Son • 2mo

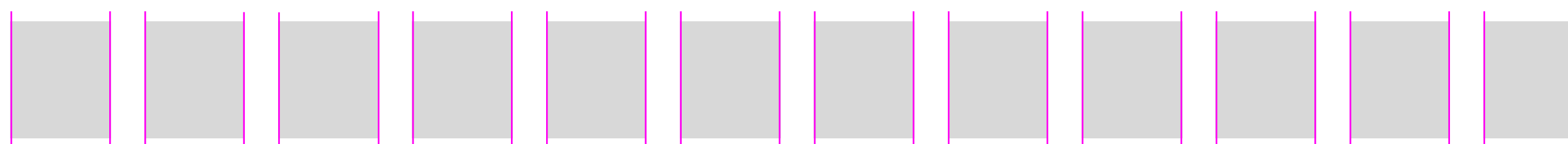
CONTACT ADVISOR 

Please provide us with your registered e-mail address and we will send you an e-mail with instructions on how to create a new password.

Cancel

Submit

GRID



Total Width: 960px

Columns: 12

Column Width: 60px

Gutter Width: 20px or 66.66% of column width

TYPOGRAPHY

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SECTION HEADERS UNIVERSNEXT FOR MORN CONDENSED BOLD 14PX


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LINKS/BUTTONS

Sign In

Add Account

SUCCESS / ERROR

 Your account has been successfully updated! Close ×

 Oops. An error has occurred. Close ×

TABLES

All	Value	Name	Bank/Custodian	Type
Investments & Other Accounts	\$114,000	1987 Ferrari Testarossa	–	Other Assets
Other Assets	\$180,000	2002 Catalina 400...	–	Other Assets
Liabilities	\$37,578	Workgroup, Inc. 401k	Prudential	Investments/Other
	\$73,205	Work Health Saving...	Fifth Third	Investments/Other
	-\$5,482	Untitled MileagePlus...	Chase	Liabilities
	\$0	American Express...	American Express	Liabilities
	-\$1,201	BankAmericard Trav...	Bank of America	Liabilities
	-\$285,491	Mortgage	PNC Bank	Liabilities
	-\$13,024	Home Equity Line	Wells Fargo	Liabilities

Balance	Type	Bank	Nickname	Description
\$19,308	Checking	CBIC	Ivan Checking	Ivan's main household checking account
\$5,869	Savings	Fifth Third Bank	Vacation Fund	Family vacation cash overflow fund
\$60,000	Savings	Fifth Third Bank	Ivan Savings	Slush fund

< 3 of 10 >

< 3 of 10 >

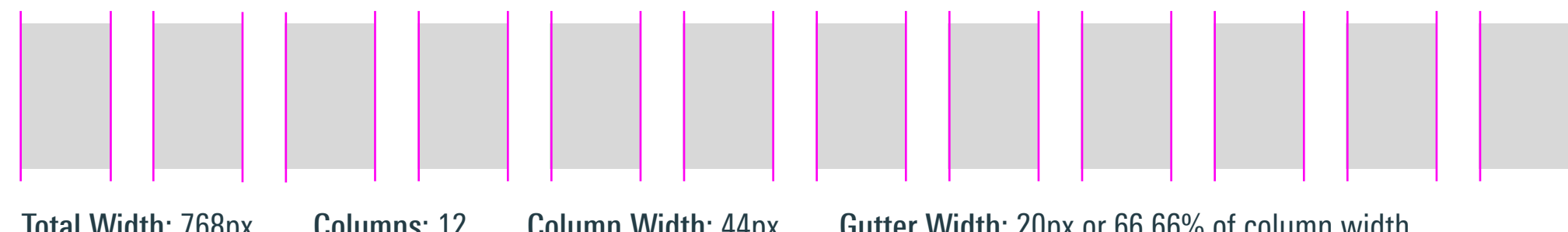
LOADING GRAPHIC

 **Small**
27x27

 **Large**
54x54

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ed.visor@gmail.com
312.123.1569

GRID



TYPOGRAPHY

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LINKS/BUTTONS

Sign In

Add Account

SUCCESS / ERROR

✓ Your account has been successfully updated! Close ×

⚠️ Oops. An error has occurred. Close ×

TABLES

- All
- Investments
- Banking
- Personal Property
- Liabilities
- Health

Value	Name	Bank/Custodian	Type
\$91,633	Roth IRA	Charles Schwab	Advised Assets
\$41,213	Timmy 529	Bright Directions	Advised Assets
\$73,205	Work Health ...	Fifth Third	Investments/Other
\$32,644	Discretionary ...	Fidelity	Investments/Other
-\$285,491	Mortgage	PNC Bank	Liabilities
-\$13,024	Home Equity Line	Wells Fargo	Liabilities
-\$5,482	United Mileage ...	Chase	Liabilities
-\$19,308	CBIC Checking	CIBC	Liabilities
\$0	American Ex...	American Express	Liabilities

Balance	Type	Bank	Nickname	Description
\$19,308	Checking	CBIC	Ivan Checking	Ivan's main household checking ...
\$5,869	Savings	Fifth Third Bank	Vacation Fund	Family vacation cash overflow fund
\$60,000	Savings	Fifth Third Bank	Ivan Savings	Slush fund

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< 3 of 10 >

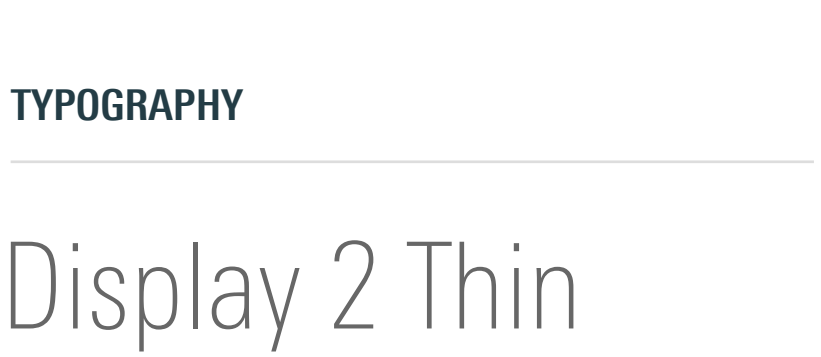
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Large 54x54

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GRID



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Column Width: 44px
Gutter Width: 20px or 66.66% of column width

TYPOGRAPHY

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Display 2 Thin

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LINKS/BUTTONS

Sign In

Add Account

SUCCESS / ERROR

Your account has been successfully updated! Close x

Oops. An error has occurred. Close x

SUCCESS / ERROR

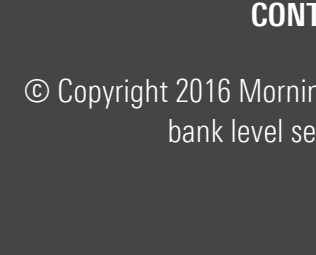
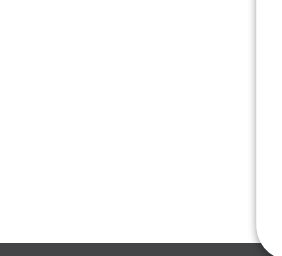
All			
\$91,633	Roth IRA Charles Schwab		>
\$41,213	Timmy 529 Bright Directions		>
\$73,205	Work Health... Fifth Third		>
\$32,644	Discretionary Fund... Fidelity		>
-\$285,491	Mortgage PNC Bank		>
-\$13,024	Home Equity Line Wells Fargo		>
-\$5,482	United MileagePlus... Chase		>
-\$19,308	CIBC Checking CBIC		>
\$0	American Express... AMEX		>
\$180,000	2002 Catalina 400...		>
\$114,000	1987 Ferrari Testarossa		>

	8/24/16 M BURGER THOMPSON	-\$5.06 \$19,308
	8/24/16 M BURGER THOMPSON	-\$5.06 \$19,308
	UNCATEGORIZED	
	Bills Cable / Internet / Phone Insurance Loan Payments Mortgage / Rent Other Bills Taxes Utilities	-\$5.06 \$19,308

< 3 of 10 >

< 3 of 10 >

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CONTACT ADVISOR

404

The page you were looking for doesn't exist.

You may have mistyped the address or the page may have moved.

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505

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