PLANNING YOUR FINANCIAL FUTURE

Manage Your Life Less, Enjoy It More

WealthVision℠
Powered by eMoney

LPL Financial

MANAGE YOUR LIFE LESS, ENJOY IT MORE

The pace and complexity of managing finances today can leave some people feeling unprepared and uncertain about their financial future.

Our comprehensive financial planning can provide strategies that are customized to your objectives and capable of addressing a wide range of circumstances and concerns. We partner with you to better position you to pursue your financial goals and aspirations.

Our planning process will help you:

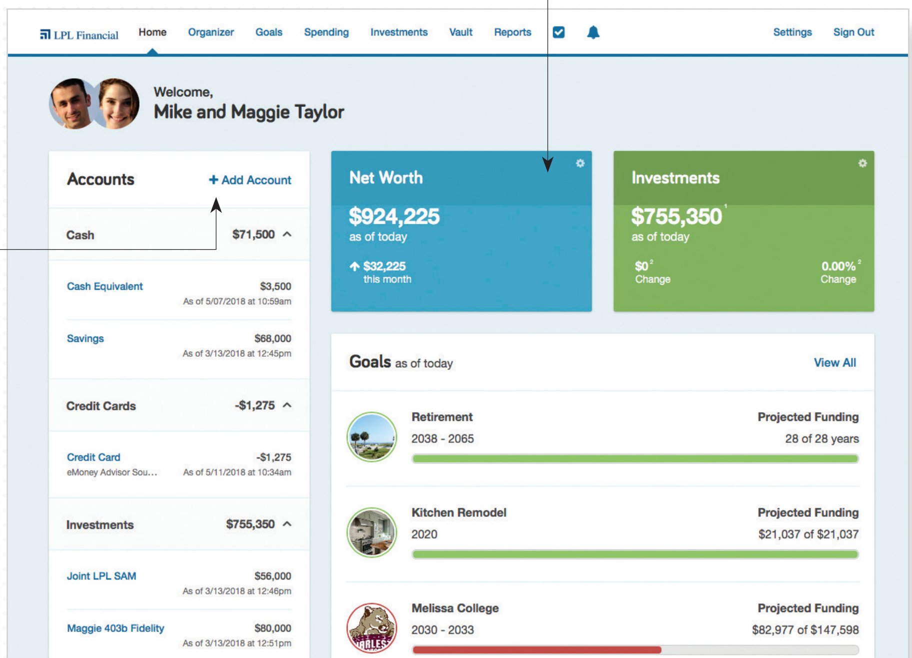
- Understand your finances from a holistic point of view.
- Create integrated strategies that take all your financial activities into account.
- Identify long-term goals and the steps needed to pursue them.
- Track your progress and make adjustments as you experience new life events.

We'll then use the WealthVision℠ platform to integrate your financial plan into a robust personal financial website. Its powerful engine can generate comprehensive financial planning analytics—calculating cash flow projections, modeling "what-if" scenarios, and generating alerts when adjustments may need to be made. You'll have access to budget tools, reports, educational materials, and storage for personal documents in one convenient and secure location.

YOUR PERSONAL FINANCIAL WEBSITE

Interactive Design

Your complete financial picture comes to life.

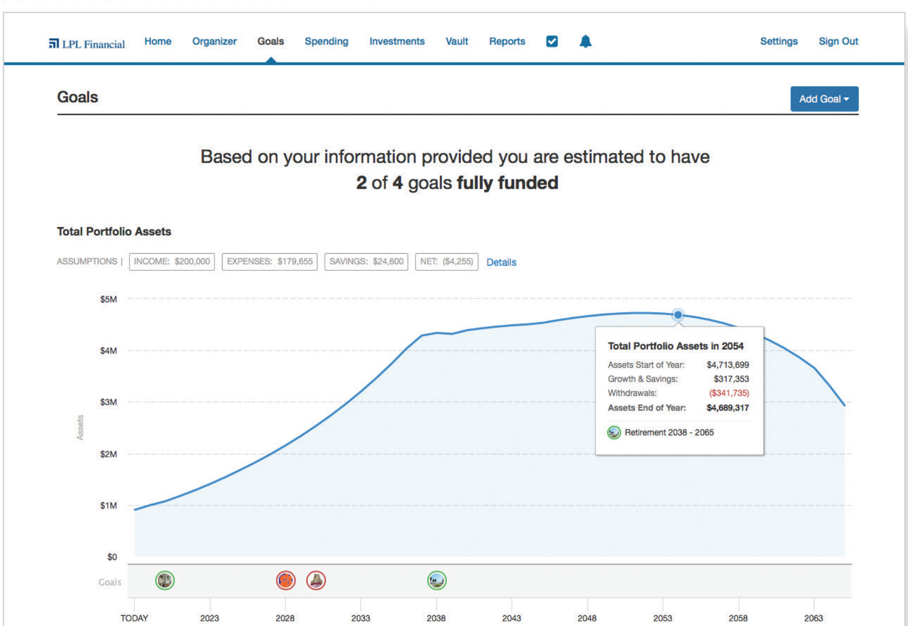


Financial Connections

Easily connect all of your accounts in one place.

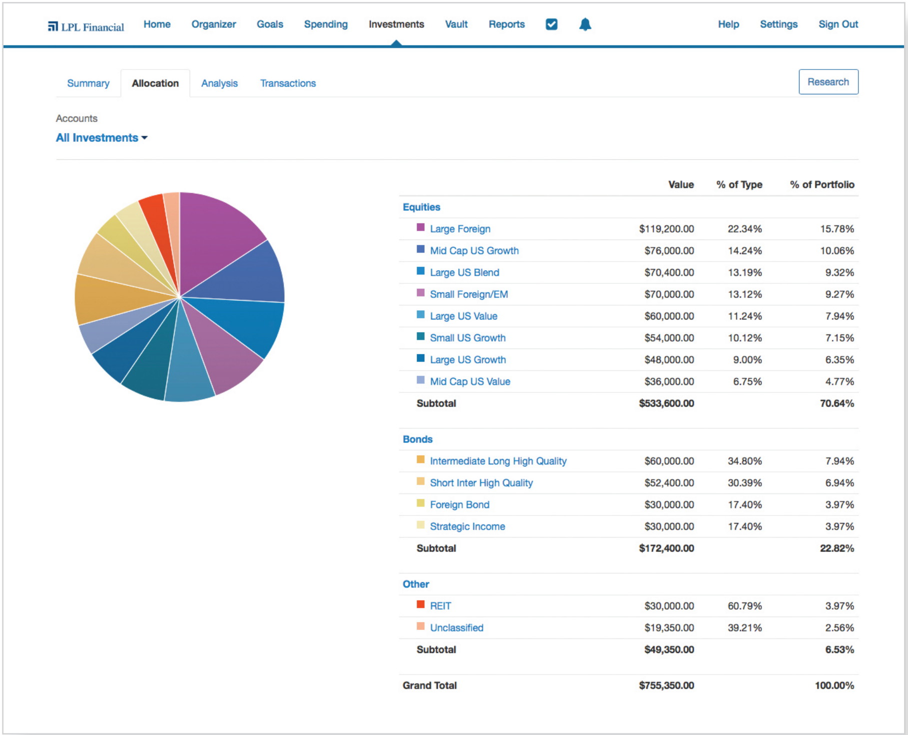
Goals

Track your progress toward various goals you would like to achieve.



Investments Page

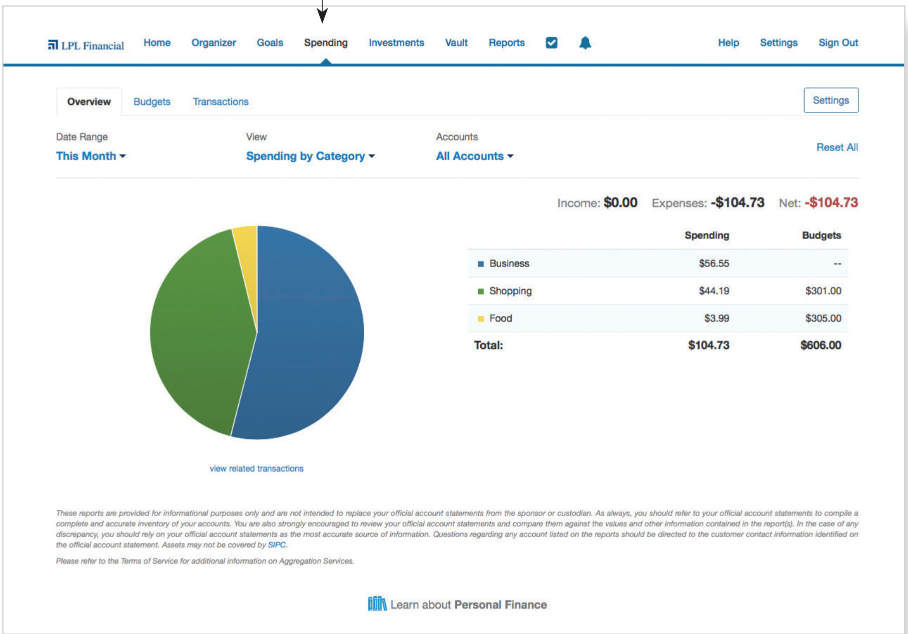
Interactive charts and detailed views provide a clear picture of accounts.



	Value	% of Type	% of Portfolio
Equities			
Large Foreign	$119,200.00	22.34%	15.78%
Mid Cap US Growth	$76,000.00	14.24%	10.06%
Large US Blend	$70,400.00	13.19%	9.32%
Small Foreign/EM	$70,000.00	13.12%	9.27%
Large US Value	$60,000.00	11.24%	7.94%
Small US Growth	$54,000.00	10.12%	7.15%
Large US Growth	$48,000.00	9.00%	6.35%
Mid Cap US Value	$36,000.00	6.75%	4.77%
Subtotal	**$533,600.00**		**70.64%**
Bonds			
Intermediate Long High Quality	$60,000.00	34.80%	7.94%
Short Inter High Quality	$52,400.00	30.39%	6.94%
Foreign Bond	$30,000.00	17.40%	3.97%
Strategic Income	$30,000.00	17.40%	3.97%
Subtotal	**$172,400.00**		**22.82%**
Other			
REIT	$30,000.00	60.79%	3.97%
Unclassified	$19,350.00	39.21%	2.56%
Subtotal	**$49,350.00**		**6.53%**
Grand Total	**$755,350.00**		**100.00%**

Budgeting Tools

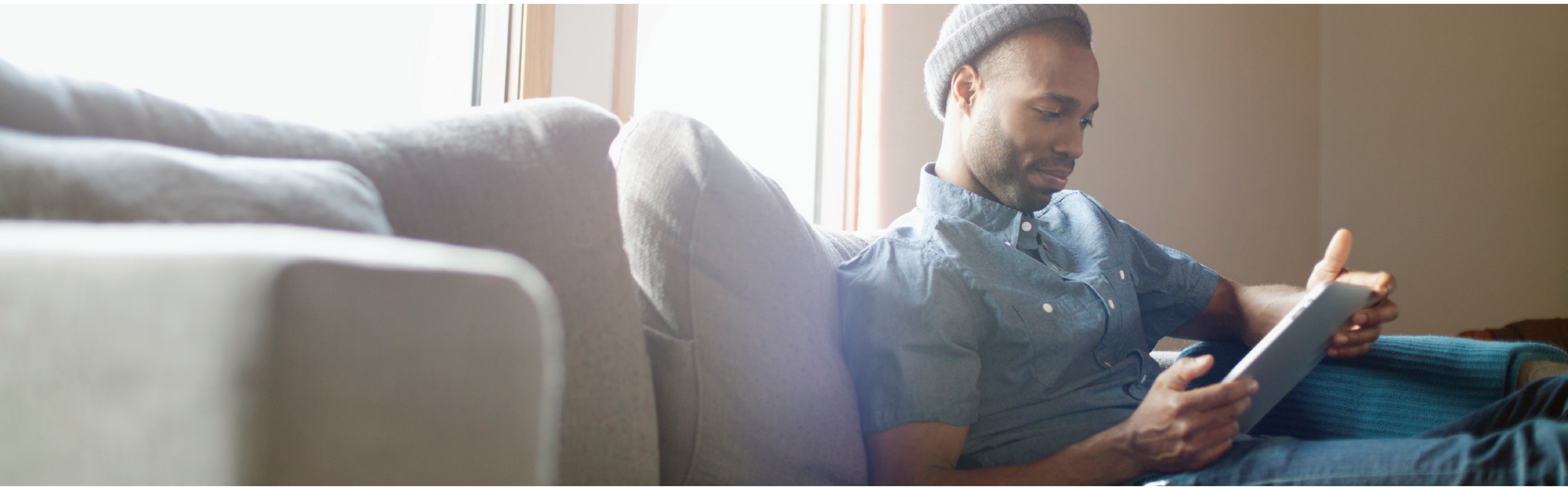
Bank and credit card transactions import so you can see what you're spending. You can also create custom categories to track where your money is going.



	Spending	Budgets
Business	$56.55	--
Shopping	$44.19	$301.00
Food	$3.99	$305.00
Total:	**$104.73**	**$606.00**

ROBUST FEATURES ON A SECURE, MOBILE PLATFORM

The WealthVision client portal is designed to provide you with the robust features you need to stay connected to your finances, goals, and important documents. Your secure personal website is available via desktop or mobile, and it allows you to track your progress against the goals set by you and your financial professional. And, perhaps most importantly, you never have to worry about your information being shared with online advertisers and other service providers.



Your client portal provides you with:

- **Tracking** of all net worth with asset and liability balances updated daily
- **Alerts** to keep you aware of significant transactions and changes in balance
- **Investment analysis** on all of your investment assets
- **A budget tool** to track and prioritize your spending
- **Reports** on net worth, cash flow, asset allocation, and more

You're just a click away from everything you need, whenever you want it, from wherever you are.

SIMPLIFY YOUR FINANCES. SPEND MORE TIME ON WHAT'S IMPORTANT

If you're looking to take the complexity out of managing your finances, it would be our pleasure to talk to you about how you can access your comprehensive financial picture today.

About LPL Financial

LPL Financial is a leader in the retail finance advice market and the nation's largest independent broker-dealer*. We serve independent financial advisors, professionals, and financial institutions, providing them with the technology, research, clearing and compliance services, and practice management programs they need to create and row thriving practices. LPL enables them to provide objective guidance to millions of families seeking wealth management, retirement planning, financial planning and asset management solutions.

*As reported by *Financial Planning* magazine, June 1996-2020 based on total revenue.

There is no assurance that a comprehensive financial plan will yield positive outcomes. The purchase of certain securities will be required to effect some of the strategies. Investing involves risks, including possible loss of principal. **IMPORTANT: The projections or other information generated by WealthVision regarding the likelihood of various investment outcomes are hypothetical in nature, do not reflect actual investment results, and are not guarantees of future results. Your results may vary with each use and over time.**

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Not Insured by FDIC/NCUA or Any Other Government Agency	Not Bank/Credit Union Guaranteed	Not Bank/Credit Union Deposits or Obligations	May Lose Value

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