

This User Guide details the classification of Investments on the Client Site.

To help you manage your wealth and monitor all of your accounts through a single, consolidated experience, there is a detailed list of account types included within the Investments view of your personal financial management website.

The investments (both in and out of estate assets) include the following account types:

- Taxable
- Qualified Retirement
- Roth IRA
- HSA
- 529
- Annuities
- Deferred Compensation
- Cash
- Stock Options
- Life Insurance Cash Values

Investments in the Accounts section are broken out into Taxable and Tax Advantaged accounts.

Knowledge Base | Home Organizer Goals Spending Investments Vault Reports

Help Settings Sign Out

Welcome

Frank and Joanna Miller

Accounts View All

[+ Add Account](#)

Cash	\$79,568
Credit Cards	-\$4,918
Taxable	\$606,699
Tax Advantaged	\$1,399,161
Life Ins Cash Values	\$35,500
Loans	-\$752,770
Property	\$1,295,000
Stock Options	\$0

Net Worth

\$1,989,240
as of today

\$6,580 this month

\$199,744 year to date

Investments

\$2,120,928
as of today

My Goals View All

Retirement

2036 - 2072

37 of 37 years
Projected Funding

College for Mary Beth

2023 - 2026

\$410,614 of \$156,080
Projected Funding