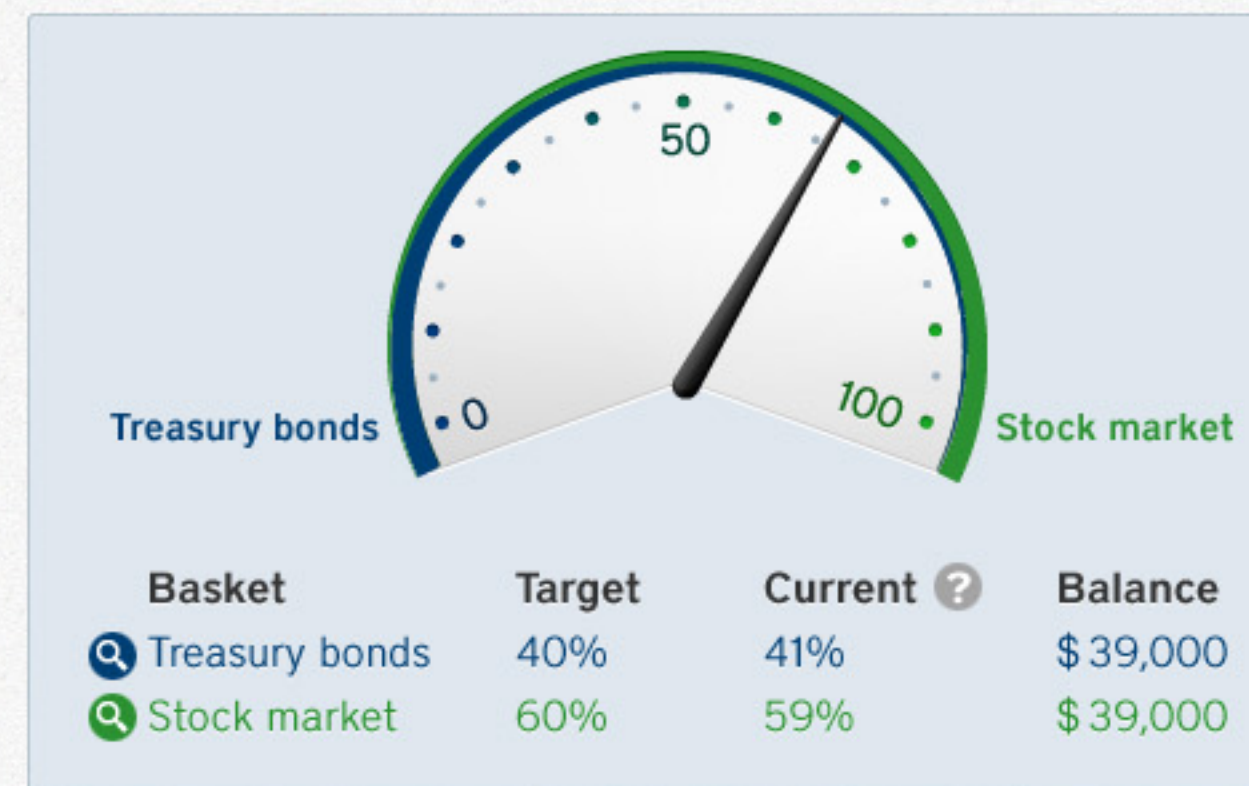


A summary of your most important information

Overview

Current balance	\$46,667.50
Since account opening (Jan 2009)	
What you've invested	\$39,000
What you've earned	\$7,667.30
Return since last month	-10.0%
Return since account opening	38.6%

Allocation


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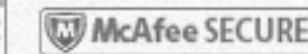
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A summary of your most important information

All Accounts
Retirement
House Down Payment

Overview of Accounts

Current balance	\$150,989.98
Retirement	\$45,002.33
House Down Payment	\$110,090.44

Since account opening (Jan 2009)	
What you've invested	\$ 39,000
What you've earned	\$ 7,667.30

Return since last month	-10.0%
Return since account opening	38.6%

Combined Allocation

Basket	Target	Current ?	Balance
Treasury bonds	40%	41%	\$ 39,000
Stock market	60%	59%	\$ 39,000

[Transfer between accounts](#)

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A summary of your most important information

[All Accounts](#)
Retirement
[House Down Payment](#)

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You're 80% of the way to your goal of \$62,500 [edit goal](#)

Allocation



Basket	Target	Current	Balance
Treasury bonds	40%	41%	\$ 39,000
Stock market	60%	59%	\$ 39,000

[Transfer between accounts](#)
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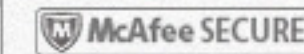
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A summary of your most important information

Retirement	\$150,983.98 ▼
Tash's Accounts	
Retirement	\$150,983.98
House Downpayment	\$3,450.85
All Accounts	\$154,434.83

[All Accounts](#)
[Retirement](#)
[House Down Payment](#)

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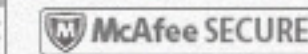
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[Retirement](#)
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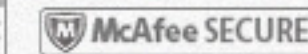
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Deposits and Withdrawals

Deposit \$

into your Retirement account.

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Withdraw \$

from your Retirement account.

[Withdraw](#)

Automatic Deposit ?

☒ On ☐ Off

You're set to automatically deposit **\$20.00** to your Retirement Account on the **First Tuesday** of each month.

Next transfer: \$ 20.00 on Tuesday, September 6, 2011.

[Automatic Deposit Settings](#)

September 2011 ▶

S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

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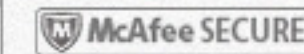
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Deposits and Withdrawals

Deposit \$

into your Retirement account.

Deposit

Withdraw \$

from your Retirement account.

Withdraw

Automatic Deposit ?

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Automatic Deposit Settings

September 2011

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11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

Please enter an amount over \$10.00

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[Compare with others](#)

Getting to your goal

Starting balance

\$ 150,983.90

Goal amount

\$

Goal type

Retirement/build wealth ▼

Monthly savings

\$1,000.00

Time to goal

1 years 50+

Which scenario are you most comfortable with...

Over the next year?

+\$10,300

+\$2,800

-\$3,660

Conservative

+\$16,900

+\$3,600

-\$7,110

Moderate

+\$24,500

+\$4,400

-\$10,400

Aggressive

A year before meeting your goal?

+\$122,000

+\$62,000

+\$22,600

Conservative

+\$236,000

+\$89,900

+\$18,200

Moderate

+\$433,000

+\$125,000

+\$12,900

Aggressive

■ upside ■ downside — likely return ?

Goal settings

Starting balance

\$10,000.00

Goal amount

\$500,000.00

Time to goal

35 years

Monthly Savings

\$1,000.00

Current \$500.00

[Set Monthly Savings](#)

Allocation

60% stocks

Current 80% stocks

[Set Allocation](#)

Need help? We can [walk you through](#).

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