

Your Online Brokerage Account: Getting Started

Accounts **Portfolio** **Markets & Research** **Service** **Tools**

Portfolio Total: \$423,635.97*

Summary | Estimated Income

Investment Accounts	Total Account Value
Pat Individual Brokerage: 033-000001	\$32,594.42
Pat and Chris Joint Account Brokerage: 033-000002	\$45,289.32
Subtotal	\$77,883.74
Retirement Accounts	Account Value
Pat IRA Brokerage: 033-000003	\$345,752.23
Subtotal	\$345,752.23
PORTFOLIO TOTAL	\$423,635.97

On-Line and Electronic Forms

as of Market Close 09/21/10

DJIA 10,761.03 **+7.41 (0.07%)** ↑

10am 12pm 1pm 4pm

NASDAQ	2,348.94	-6.48 (-0.28%)	↓
S&P 500	1,139.83	-2.93 (-0.26%)	↓
FTSE 100	5,576.19	-26.350 (-0.47%)	↓
NIKKEI 225	9,603.14	-23.98 (-0.25%)	↓

Go paperless!

- Select Account Details
- Click the Edit button

* Brokerage accounts reported as of: 08/10/2010, 11:23pm. Securities are priced real-time.

Quote Enter Symbol **Go**

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Notes

- A** Provides easy online access to your brokerage account information. The functions provided are accessible from the menu bar across the top portion of the application window.
- B** The menus above the menu bar provide additional support. The Settings menu allow you to customize the information that displays.
- C** Click **Accounts** to search for or select an account to view. Accounts provides similar information as the Portfolio Summary page, but in an alternate format.
- D** Portfolio Summary displays account value information and also gives you quick access to key account functions. You can take action on an account by selecting from the adjacent Select Action drop-down list. This feature is designed to provide a quick and efficient way to help manage your accounts.
- E** This box displays current trending on four major indices. Market data is provided by a third party, Interactive Data Managed Solutions. You can click an index to view an index chart. Quotes are delayed 15 minutes; real-time quotes are also available.
- F** Helpful messages highlight opportunities to help you further streamline your brokerage account management.
- G** Quick Quotes provides quick access to quote information. To obtain a quote, type a symbol into the field and click Go.
- H** Quick Quotes expands and displays quote information for that symbol. Note that the quoted symbol is listed first in the box, followed by any other securities (up to 25) for which you requested quotes.

Correspondent logo/
member name here

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