

Investments

Keeping track of all your investment accounts can be cumbersome when they are held at multiple financial institutions. The Investments section on Wealth 360 gives you one place to view detailed summaries of all your financial accounts.

ACCOUNT VALUE HISTORY

Each month, your investment account balances are recorded so you can easily track if their value has increased or decreased over specific periods of time.

ASSET ALLOCATION

Easily view the asset types and holdings that make up your investment accounts so you always know how your assets are allocated.

CURRENT VALUES

Account holdings update with the market throughout the day so you always know the current value of your investments.

MARKET INSIGHTS

Easily access trusted market news and investment research from Morningstar so you can skip the online searches when you're interested in learning more about the markets.

