# 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.

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Accounts All Investments -				
All Asset Types		Value	% of Type	% of Portfolio
	Equities	Tuluo	,e er ijpe	
	Balanced	\$2,235,094.29	53.50%	50.11%
	Large-Cap Blend	\$1,525,404.11	36.51%	34.20%
	Small-Cap Growth	\$134,473.11	3.22%	3.01%
	Large-Cap Value	\$93,691.03	2.24%	2.10%
	Large-Cap Growth	\$91,014.14	2.18%	2.04%
	Mid-Cap Value	\$55,101.64	1.32%	1.24%
	International	\$16,115.14	0.39%	0.36%
	Mid-Cap Blend	\$12,398.28	0.30%	0.28%
	Mid-Cap Growth	\$8,968.11	0.21%	0.20%
	Emerging Markets	\$3,537.24	0.08%	0.08%
	Small-Cap Value	\$1,071.95	0.03%	0.02%
	Small-Cap Blend	\$1,033.09	0.02%	0.02%
	Subtotal	\$4,177,902.13		93.67%