Watch List

N Northwest Investment Services

N NIS ≡

Watchlist

01/01/2010 - 06/31/2010

Johndoe
Super Admin

- Compliance
- Dashboard
- Review Manual Blotter
- Review Trade Blotter
- View Compliance Graph
- Setup House Accounts
- Setup Objects
- Setup Rules
- Setup Watch List

+ Add | Export to PDF | Export to Excel | Show Customisation Window

List Type

☑ Rep
☑ Customer
☑ Account

Status Type

☑ Pending
☑ Open
☑ Closed

Risk Level

Search | Reset

Watchlist Search Results

| Reps | Customers | Account | Symbols |

Search...

Rep Name	Rep 3Char Code	Status	RiskLevel	Last Modified By	Last Modified Date	Rep SSN
HENDERSON DEEN	BC366	381	Adjust Security	HOHN	2019-02-25	SSN238
HENDERSON DEEN	BC348	362	New Security	MURPHY	2019-05-07	SSN280
DONEE TROY	BC321	382	New Annuity	CHARLES CLARK JR	2020-07-25	SSN358
STEVEN FIELDER	BC400	203	New Annuity	HOHN	2014-08-27	SSN216
MURPHY CHRIS	BC242	338	New Security	CHARLES CLARK JR	2018-12-13	SSN303
STEVEN FIELDER	BC307	229	New Security	HENDERSON	2014-09-06	SSN385
STEVEN FIELDER	BC202	257	New Annuity	HENDERSON	2018-07-07	SSN334
DONEE TROY	BC299	223	Cancel, Withdraw Security	HOHN	2017-10-25	SSN213
HENDERSON DEEN	BC272	308	Adjust Security	MURPHY	2020-02-20	SSN260
DONEE TROY	BC268	298	New Annuity	DONEE	2019-08-21	SSN321
MURPHY CHRIS	BC209	253	Edit Insurance	HENDERSON	2015-09-29	SSN230
CHARLES CLARK JR	BC279	289	Cancel, Withdraw Security	HOHN	2014-08-24	SSN259

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Microsoft Partner Network | Titanium

Add

NIS

Watch List Search Results

Jahedee

+Add | Export to PDF | Export to Excel | Show Customization Window

dashboar
d
Review Views of Broker

Review Trade Blotter

View Compliance Graph

Setup House Accounts

Setup Objects

Setup Rules

Setup Watch List

Reps | Customers | Account | Symbols

Reps

Search...

Add Symbol To Watch List ID [New]

Symbol

Risk Level
-- select --

Status

Comments

Save   Reset

Showing 4 from 20 data

Previous | 1 | 2 | 3 | Next