

# Wealth Management Report

Total Invested: \$3932.78

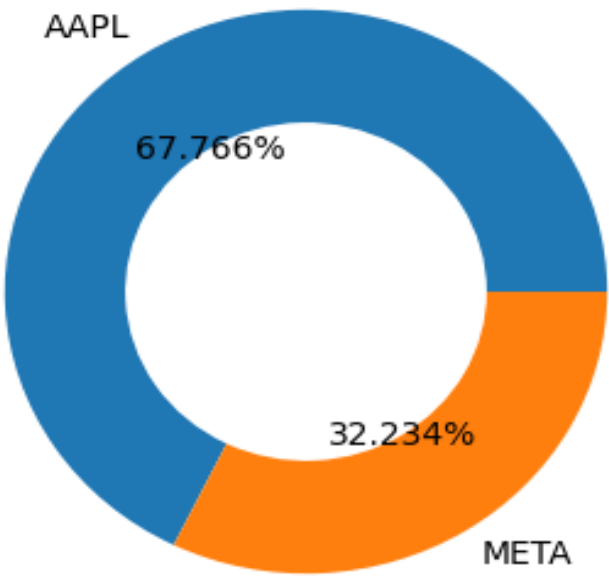
Current Value: \$4104.12

Profit / Loss: \$171.34

Best Asset: AAPL (7.18%)

Worst Asset: META (-1.13%)

## Asset Allocation



## Goals

Goal Type	Target Date	Target	Saved	Progress %
education	2027-02-19	\$250000.00	\$20000.00	8.0%

## Recent Transactions

Symbol	Type	Qty	Price	Fees	Date
AAPL	buy	10.0	\$259.48	\$0.00	2026-02-01 20:56:17.991468
META	buy	2.0	\$668.99	\$0.00	2026-02-05 15:02:58.428503