

Trade Recommendations - 12/2/2019

Household, Client

Equity Target
55%

CLIENT TRUST

Custodian Account Type
TD Ameritrade Institution Joint (JTWROS)

Action	Trade	Symbol	Description
SELL	-\$2,500.00	MMDA12	TD Bank FDIC Insured Money Market
BUY	\$2,500.00	LALDX	Lord Abbett Short Duration Income A

CLIENT ROLLOVER IRA

Custodian Account Type
TD Ameritrade Institution Traditional Rollover IRA

Action	Trade	Symbol	Description
SELL	-\$7,000.00	DFGEX	DFA Global Real Estate Securities Port
SELL	-\$12,600.00	DFSVX	DFA US Small Cap Value I
SELL	-\$18,000.00	DFWIX	DFA World ex US Core Equity Instl
SELL	-\$14,800.00	VOE	Vanguard Mid-Cap Value ETF
SELL	-\$13,500.00	VUG	Vanguard Growth ETF
BUY	\$28,000.00	ANAYX	AB Global Bond Advisor
BUY	\$16,000.00	LALDX	Lord Abbett Short Duration Income A
BUY	\$21,900.00	PYCBX	Payden Core Bond