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brings new possibilities to your practice.

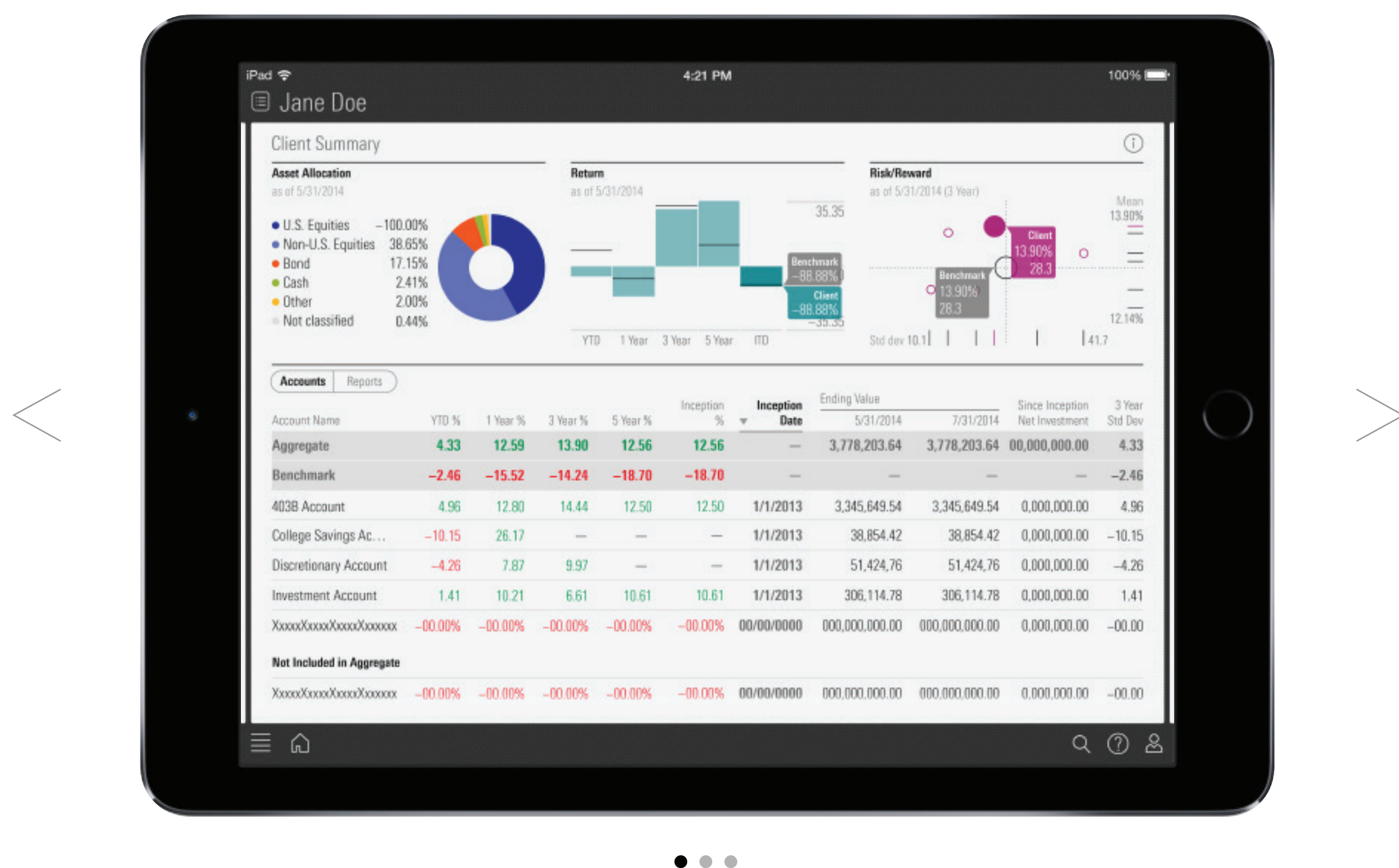


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Client Dashboard

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Portfolio X-Ray®

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The screenshot displays a financial dashboard for a user named 'Jane Doe'. The dashboard is divided into several sections:

- Client Summary:** Located at the top, it includes a profile icon and the name 'Jane Doe'.
- Asset Allocation:** A section on the left showing a pie chart and a list of assets:
 - U.S. Equities: 100.00%
 - Non-U.S. Equities: 39.85%
 - Bond: 17.50%
 - Cash: 2.47%
 - Deriv: 2.00%
 - Not classified: 0.44%
- Return:** A bar chart showing performance over 12 months, with a total return of 25.35%.
- Risk Score:** A gauge chart showing a risk score of 18.80% (Low Risk).
- Transactions:** A table at the bottom showing a list of transactions with columns for Account, Aggregate, Inception Date, Ending Value, Inception Value, Green Inception Value, and a 3-Year Return.



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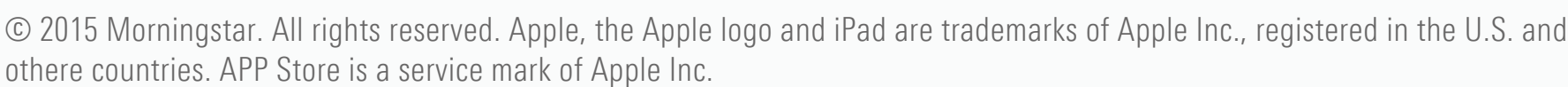
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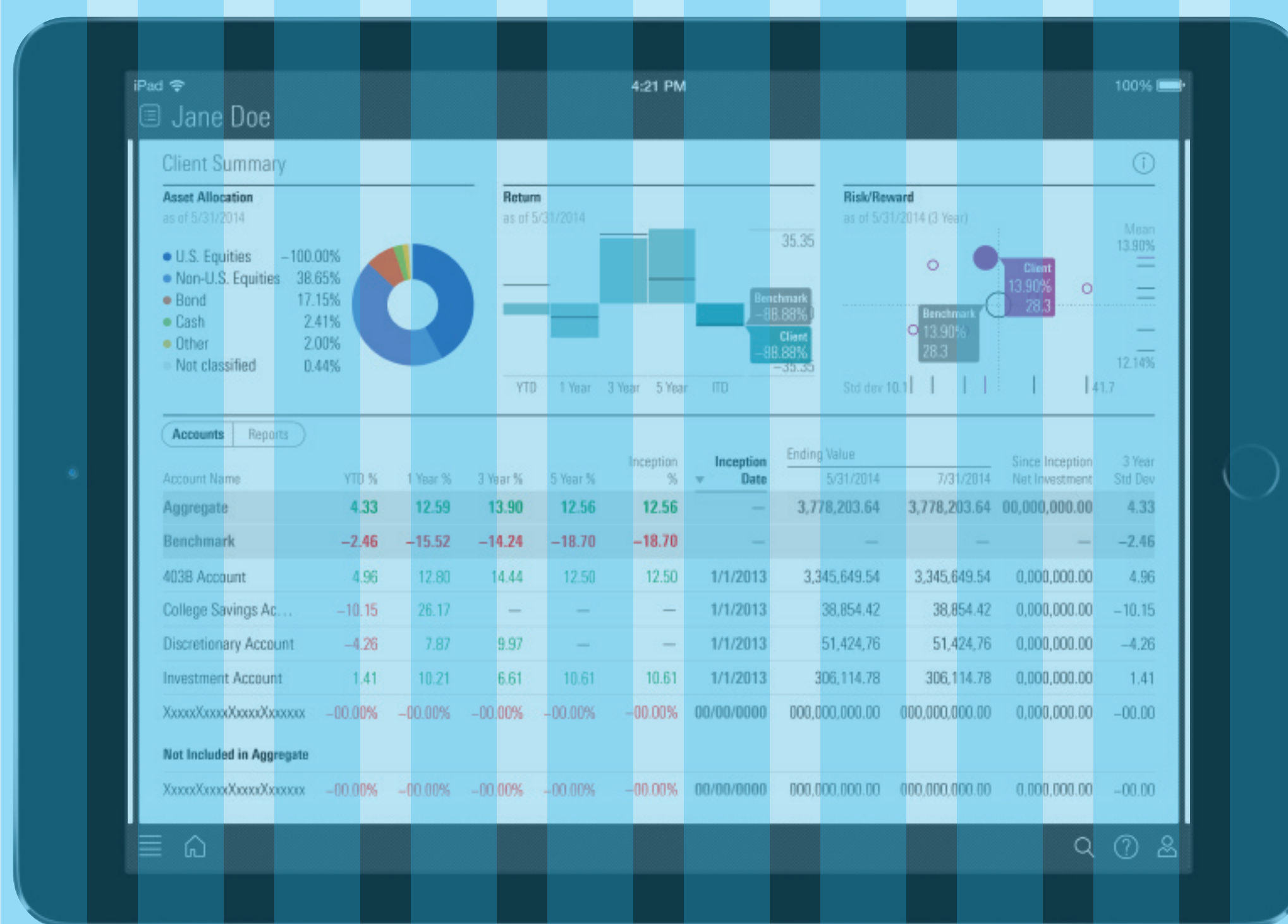
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Client Summary

as of 5/31/2014

Asset Allocation

U.S. Equities -100.00%

Non-U.S. Equities 38.65%

Bond 17.15%

Cash 2.81%

Other 2.00%

Not classified 0.44%

Return

as of 5/31/2014

35.35

YTD 1 Year 3 Year 5 Year TTD

Risk/Reward

as of 5/31/2014 (3 Year)

35.35

Client 13.90%

Benchmark 12.14%

Accounts

Reports

Account Name	YTD %	1 Year %	3 Year %	5 Year %	Inception %	Inception Date	Ending Value	5/31/2014	7/31/2014	Since Inception	3 Year Std Dev
Aggregate	4.33	12.59	13.90	12.56	12.56	—	3,778,203.64	3,778,203.64	00,000,000.00	4.33	
Benchmark	-2.46	-15.52	-14.24	-18.70	-18.70	—	—	—	—	-2.46	
403B Account	4.96	12.80	14.44	12.50	12.50	1/1/2013	3,345,649.54	3,345,649.54	0,000,000.00	4.96	
College Savings Ac...	-10.15	26.17	—	—	—	1/1/2013	38,854.42	38,854.42	0,000,000.00	-10.15	
Discretionary Account	-4.26	7.87	9.97	—	—	1/1/2013	51,424.76	51,424.76	0,000,000.00	-4.26	
Investment Account	1.41	10.21	6.61	10.61	10.61	1/1/2013	306,114.78	306,114.78	0,000,000.00	1.41	
XxxxxXxxxxXxxxx	-00.00%	-00.00%	-00.00%	-00.00%	-00.00%	00/00/0000	000,000,000.00	000,000,000.00	0,000,000.00	-00.00	
Not Included in Aggregate	XxxxxXxxxxXxxxx	-00.00%	-00.00%	-00.00%	-00.00%	00/00/0000	000,000,000.00	000,000,000.00	0,000,000.00	-00.00	

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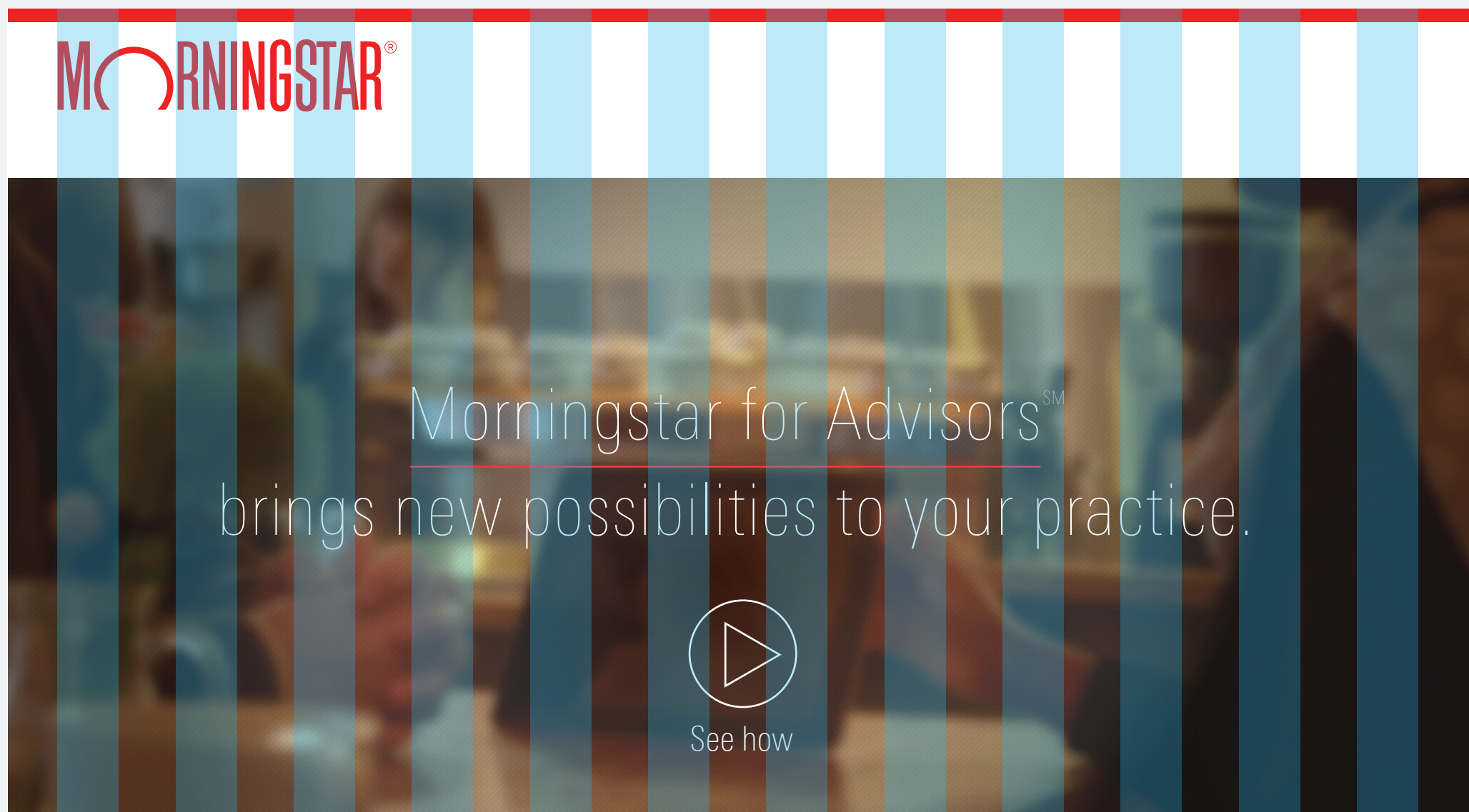
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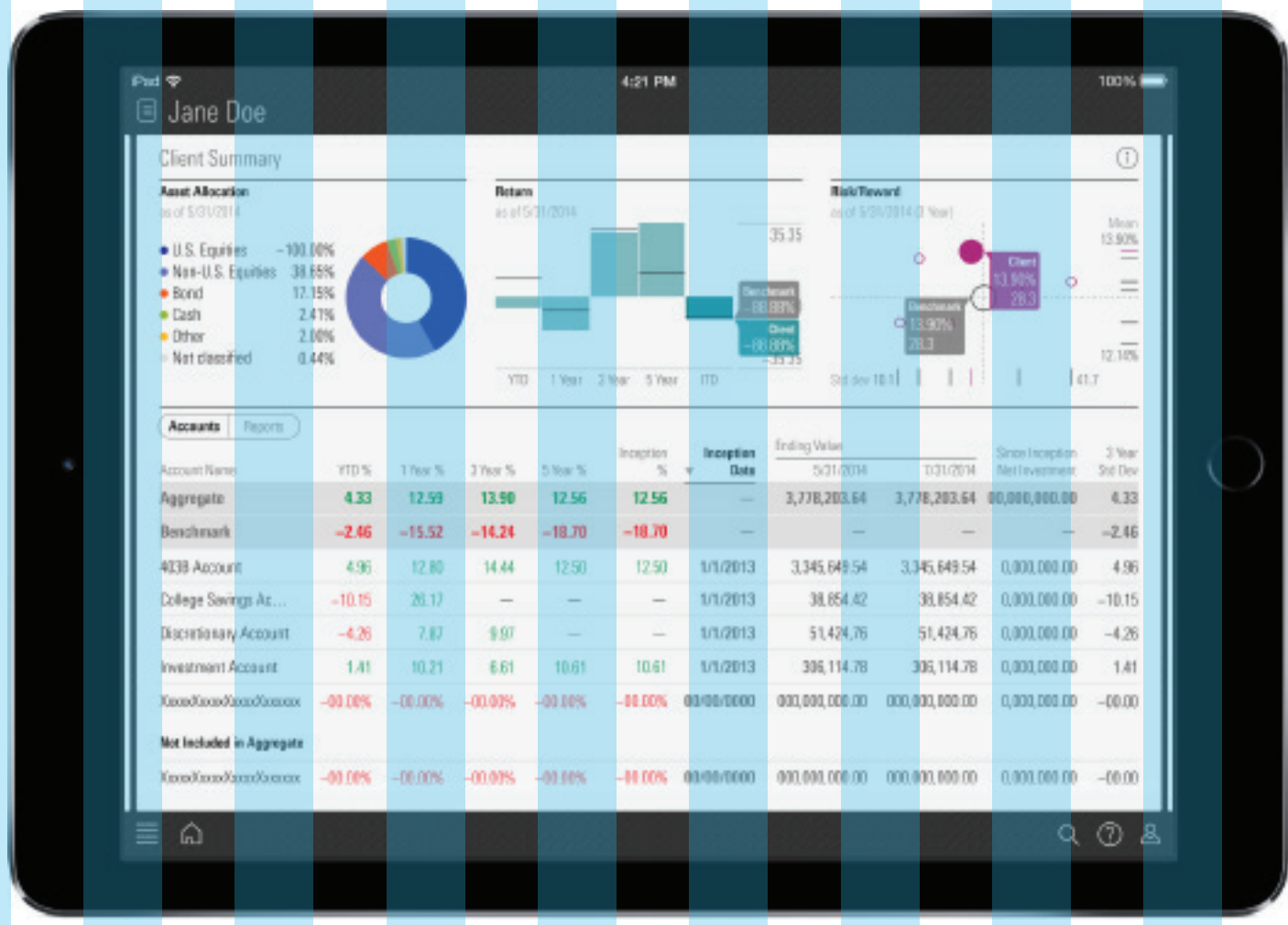
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Asset Allocation

Return

Rollforward

Accounts

Reports

Account Name

YTD %

1 Year %

3 Year %

5 Year %

Interp

Interp

Roll Date

Roll Date

Roll Date

Roll Date

Roll Date

Roll Date

Aggregate

6.33

12.59

12.89

12.56

12.56

3,778,203.64

3,778,203.64

90,000,000.00

6.33

Benchmark

-2.66

-15.32

-16.24

-16.70

-16.70

401K Account

4.96

12.80

14.44

12.50

12.50

0/0/2013

3,345,448.54

3,345,448.54

0.000,000.00

4.96

College Savings Ac.

-10.10

28.13

0/0/2013

38,654.42

38,654.42

0.000,000.00

-10.10

Discretionary Account

-4.26

7.87

9.07

0/0/2013

3,424.76

3,424.76

0.000,000.00

-4.26

Investment Account

1.41

10.21

6.41

10.01

10.01

0/0/2013

306,114.76

306,114.76

0.000,000.00

1.41

KnowledgeAssessments

-80.00%

-80.00%

-80.00%

-80.00%

-80.00%

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000,000,000.00

0.000,000.00

-80.00

Not Included in Aggregate

KnowledgeAssessments

-80.00%

-80.00%

-80.00%

-80.00%

-80.00%

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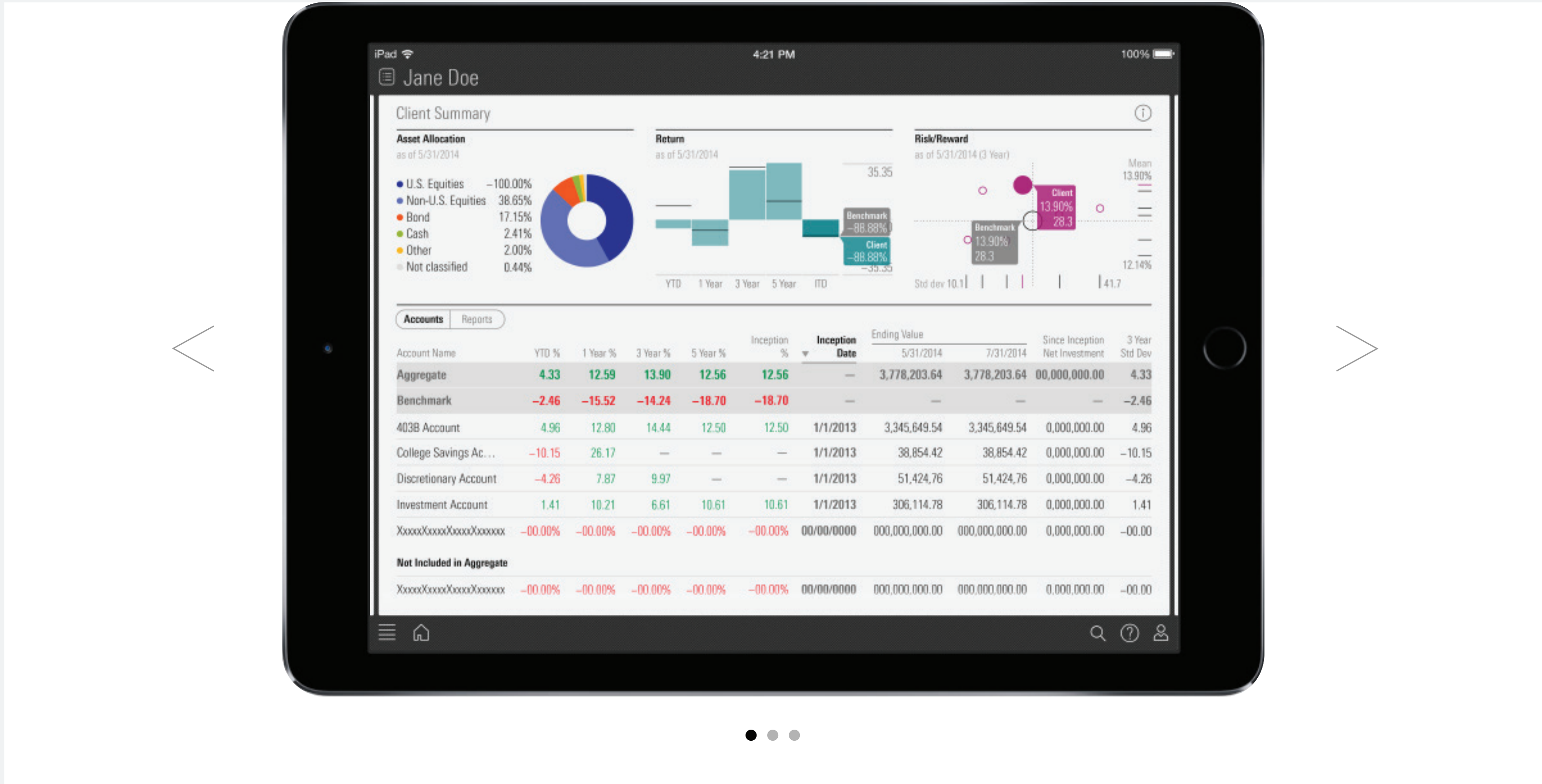
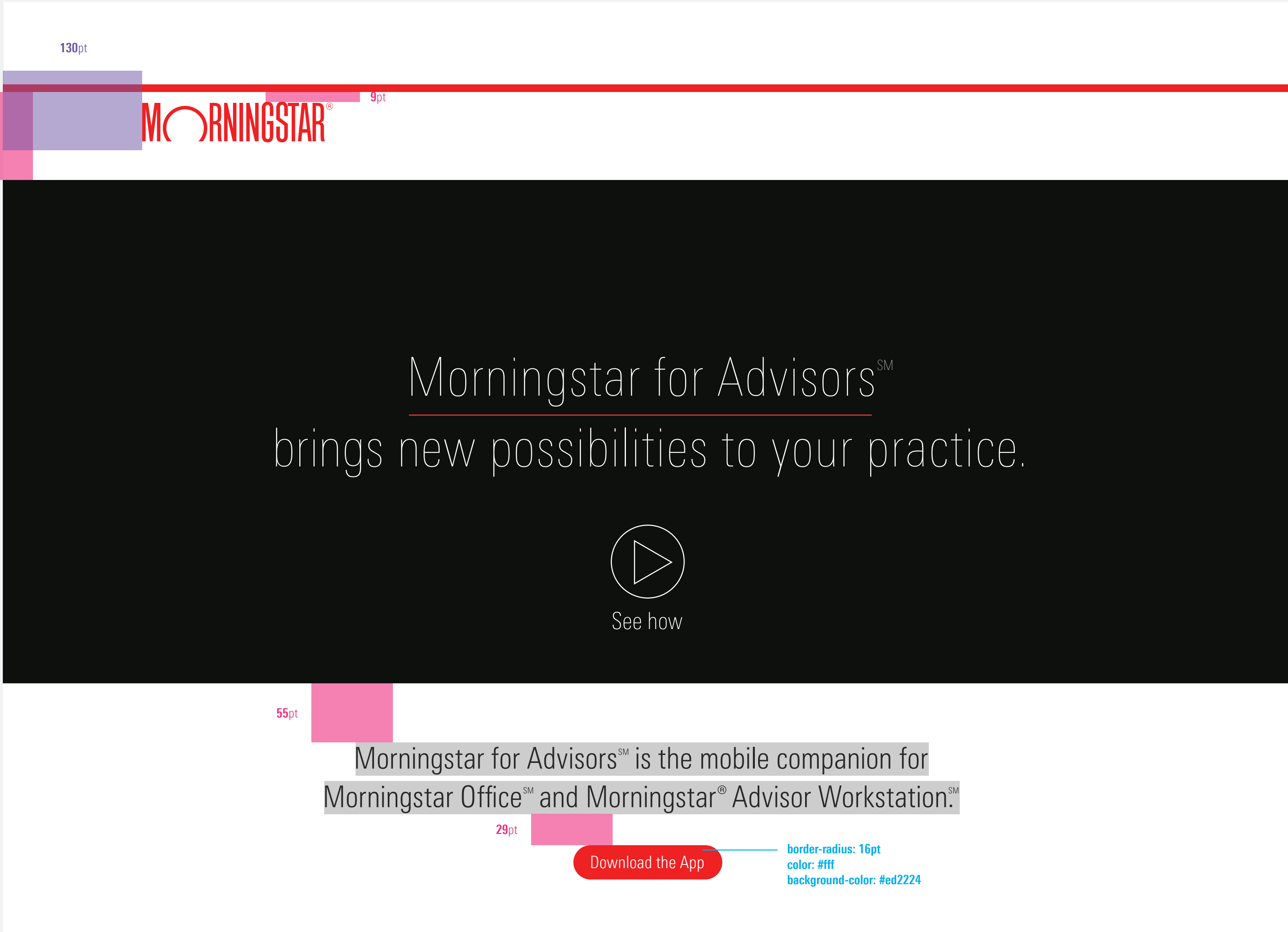
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