

Expandable Line Item-Details

Expand without Validation

Line Item

Description \*

Member

Amount

Salary

Teddy

\$100,000 /yr

⌵

✕

Expanded

Description \*

Member

Amount

Salary

Teddy

\$100,000 /yr

⌵

✕

Type

Frequency

Amount per Period

Start Date

End Date

Inflation +/- Additional

Salary

Monthly

\$5,000

2018

2020

+ 0.00%

Close

Expandable Line Item-Tabs

Expand Tab Adding Entry

Line Item

Description \*

Type

Owner

Market Value

Cost Basis

Asset Class Weightings

Return Rate

Savings

Holdings

Teddy's 401(k)

401(k)

Teddy

\$60,000

\$60,000

Small Cap Equity

6.03%

+ Add

+ Add

⌵

✕

Expanded

Description \*

Type

Owner

Market Value

Cost Basis

Asset Class Weightings

Return Rate

Savings

Holdings

Teddy's 401(k)

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Teddy

\$60,000

\$60,000

Small Cap Equity

6.03%

+ Add

+ Add

⌵

✕

Holdings

Savings Strategies

Redemptions

Return Rates

Beneficiaries

Account Fee Setup

Description

Symbol

Market Value

Hold % / \$

Cost Basis

Valuation Date

Asset Class Weightings

Return Rates

New Holding

ADD

\$0

0%

\$0

Jan 1 2018

Small Cap Equity

0.00%

✕

+ Add

Close

Expand Switch Tab

Expanded

Description \*

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Account Fee Setup

Amount

Frequency

Start Date

End Date

Inflation +/- Additional

0.00%

Monthly

2018

2020

+ 0.00%

✕

+ Add

Close

Expandable Line Item-Delete

Delete with no Tabs

Line Item

Description \*

Member

Amount

Salary

Teddy

\$100,000 /yr

Are you sure you want to delete this item?

Delete

Cancel

Expanded

Description \*

Member

Amount

Salary

Teddy

\$100,000 /yr

Are you sure you want to delete this item?

Delete

Cancel

Type

Frequency

Amount per Period

Start Date

End Date

Inflation +/- Additional

Salary

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Close

Delete within Tabs

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New Holding

ADD

\$0

0%

\$0

Are you sure you want to delete this item?

Delete

Cancel

+ Add

Close

Expandable Line Item-Validation

Validation not Expanded

Validation

Description \*

Member

Amount

↺

Salary

Teddy

\$100,000 /yr

⌵

✕

Error

Description \*

Member

Amount

●

Salary

Teddy

\$100,000 /yr

⌵

✕

Invalid

Good

Description \*

Member

Amount

●

Salary

Teddy

\$100,000 /yr

⌵

✕

Expand with Validation

Line Item

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Expand Tab with Multiple Entries

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(1)

(3)

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(1)

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New Holding

ADD

\$0

0%

\$0

Jan 1 2018

Small Cap Equity

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New Holding

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