

Financial Summary Report

Generated: April 22, 2025

Client Information

Name: Maria Garcia
Email: maria@example.com
Phone: 555-456-7890
Risk Profile: Moderate
Segment: Mass Affluent
Total Assets: \$350,000.00

Account Summary

Account Type	Opening Date	Current Balance	Currency
Brokerage	2019-02-28	\$350,000.00	USD
Total		\$350,000.00	

Account Details

Brokerage (ID: 106)

Opening Date: 2019-02-28T00:00:00

Current Balance: \$350,000.00

Currency: USD