

#
Definitions
[dateValue]
[point]
accountType
allocationPartition
allocationType
assetType
cFlowSequenceSpec
capitalizationPartition
capitalizationType
costBasis
date
dateRange
dateValue
double
dynamic
expenseType
holdingKey
holdingType
iEItem
incomeStatement
incomeType
instrumentPartitions
interpolationType
investmentStyle
investmentStylePartition
itemSource
liabilityType
partitionMapping
paymentFrequency
point
quantityBin
rateCurve
taxCategory
taxType
taxingAuthority
timeSeries
(double)
(iEItem)

#/definitions/cFlowSequenceSpec	
Properties	
! dateRange	{}
! growth	{properties: {curveData: {\$ref: ...}}
! initialValue	{}
! paymentFrequency	enum=[Once, Monthly, Semian...

#/definitions/paymentFrequency	
Enum Values	
Once	
Monthly	
Semiannual	
Annual	

#/definitions/iEItem	
Properties	
! details	{properties: {data: {\$ref: ...}}
! itemSource	enum=[BalanceSheet, FlowMod...
! source	string

#/definitions/timeSeries	
Properties	
! data	array

#/definitions/itemSource	
Enum Values	
BalanceSheet	
FlowModel	

#/definitions/incomeStatement	
Properties	
! expenses	object
! incomes	object
! year	integer

#/definitions/quantityBin	
Properties	
! data	array
! interpolationType	enum=[Linear, Step, Cubic]

#/definitions/point	
Properties	
! x	number
! y	number

#/definitions/interpolationType	
Enum Values	
Linear	
Step	
Cubic	

#/definitions/costBasis	
Properties	
! unitValue	{}
! units	{}

#/definitions/capitalizationPartition	
Properties	
! largeCap	{}
! midCap	{}
! smallCap	{}

#/definitions/instrumentPartitions	
Properties	
! allocationPartition	{properties: {stock: {\$ref: ...}}
! capitalizationPartition	{properties: {smallCap: {\$r...
! investmentStylePartition	{properties: {value: {\$ref: ...}}

#/definitions/investmentStylePartition	
Properties	
! blend	{}
! growth	{}
! value	{}

#/definitions/allocationPartition	
Properties	
! bond	{}
! cash	{}
! other	{}
! stock	{}

#/definitions/partitionMapping	
Properties	
! partitionMap	object
! partitioned	{}
! unpartitioned	{}

#/definitions/(double)	
Additional Properties	
Must Be:	{}

#/definitions/holdingKey	
Properties	
! accountName	string
! holdingName	string

#/definitions/accountType	
Enum Values	
Other	
RothIrs401k	
TraditionalIrs401k	
CollegeIrs529	
TraditionalIra	
Investment	
Brokerage	
Checking	
HealthSavingsAccount	
Savings	
MoneyMarket	
Mattress	

#/definitions/assetType	
Enum Values	
Other	
Investment	
PrimaryResidence	
FamilyProperty	
FinancialInstrument	
Automobile	
LifeInsurancePolicy	
CompanyStockOption	
Savings	
CollegeSavings	
RetirementSavings	
Cash	
RentalProperty	

#/definitions/liabilityType	
Enum Values	
Other	
Mortgage	
AutoLoan	
CollegeDebt	
CreditCardDebt	

#/definitions/holdingType	
Enum Values	
Other	
Stock	
Bond	
Cash	
Blend	

#/definitions/taxCategory	
Enum Values	
LaborIncome	
InterestIncome	
QualifiedDividendIncome	
UnqualifiedDividendIncome	
ShortTermCapitalGain	
LongTermCapitalGain	
SocialSecurityIncome	
PensionIncome	
OtherOrdinaryIncome	
Inheritance	
RentalIncome	
PropertyValue	

#/definitions/taxType	
Enum Values	
OrdinaryIncome	
QualifiedDividend	
LongTermCapitalGain	
ShortTermCapitalGain	
Inheritance	
Medicare	
SocialSecurity	
Property	

#/definitions/taxingAuthority	
Enum Values	
Federal	
State	

#/definitions/incomeType	
Enum Values	
Other	
InterestIncome	
CapitalGain	
LongTermCapitalGain	
ShortTermCapitalGain	
QualifiedDividendIncome	
NonqualifiedDividendIncome	
CapitalGainDistributionIncome	
InheritanceIncome	
PensionIncome	
RentalIncome	
SocialSecurityIncome	
LaborIncome	
LotteryIncome	

#/definitions/expenseType	
Enum Values	
Other	
InterestExpense	
CapitalDepreciation	
LongTermCapitalLoss	
ShortTermCapitalLoss	
LivingExpense	
PensionContribution	
AutoExpense	
CollegeExpense	
MedicalExpense	
Alimony	
Palimony	
CharitableDonation	
TaxesFederal	
TaxesState	
TaxesProperty	
DebtMortgage	
DebtCollege	