

Reports: Viewing the Dashboard

Dashboard Run Date: 2-Mar-2017 11:41 AM

A Search By: All Accounts | ALL ACCOUNTS | Clients: 47 | Accounts: 28 | Total Account(s) Value: \$13,468,478.41 | Save Filter

B Security Allocation

C Assets Under Management (AUM)

D Highest Value

E Most Cash Available to Trade

F Accounts For Attention

G Retirement Account Summary

H Estimated Income

I Cash Flow

Data as of: 01-Mar-2017

Reports > Dashboard

Dashboard provides a one-stop collection of data to help you manage your current book of business. At a glance, you can view specific totals across your authorized accounts and then quickly run related reports without having to enter report criteria. Note that this screen is an illustration.

Data in all sections, except Most Cash Available to Trade and Highest Value, reflects accounts selected using the Search By filter. To view data in the Retirement Account Summary and the Estimated Income sections, you must first select an account or client.

- A** Select the **Search By** drop-down list to limit Dashboard results to a single account or client, or to a subset of accounts associated with one or more branch prefixes, agencies, or registered representative codes.
- B** Select a section title, such as Security Allocation, to drag it to another location on the window, thereby creating an arrangement that suits you.
- C** Select **Save Filter** to save your current filter selections and arrangement of sections as your default setting. The next time you open Dashboard, the display defaults to the saved filter and arrangement of sections.
- D** Information about the current filter is available in the Dashboard header, including the current filter value(s), total number of accounts, total number of clients, and total value of accounts in the filtered results.
- E** An as-of date indicates the timeliness of data in a section. A run date at the top of the window indicates when Dashboard was last opened.
- F** You can view a prompted report for the Most Cash Available to Trade and Highest Value sections. Select **Account** or **Client**, and then select the **View Report** link in that section.
- G** To collapse a section, select the down arrow and select **Minimize**. To expand a section to fill the Dashboard window, select the down arrow and select **Maximize**. To return a section to the original size, select the down arrow and select **Restore**.
- H** You can switch between contributions and distributions for retirement accounts by selecting **Contributions** or **Distributions**.
- I** Select a **View Report** link to launch a report for that section.

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