



# planning your financial future





manage  
your life less,  
enjoy it more



## Financial Planning with WealthVision<sup>SM</sup>

The pace and complexity of managing modern finances leaves many people feeling unprepared and uncertain about their financial future.

Our advisory process is comprehensive, customized to your objectives and capable of addressing a wide range of financial circumstances and concerns. We partner with you to pull all your finances together and organize them in one centralized location to better position you to pursue your financial goals and aspirations.

Our planning process will help you:

- See your finances from a holistic point of view
- Create integrated strategies that take into account all your financial activities
- Identify long-term goals and the steps needed to pursue them
- Track your progress and make adjustments as you experience new life events

The WealthVision<sup>SM</sup> platform will then integrate your financial plan with a robust, personal financial website. Its powerful engine can generate comprehensive financial planning analytics—calculating cash flow projection, modeling “what-if” scenarios and generating alerts when adjustments may need to be made. You will have access to budget tools, reports, educational materials and storage for personal documents in one convenient and secure location.

## Robust Features on a Secure, Mobile Platform

The WealthVision Client Portal is designed to provide you with the robust features you need to keep in touch with what's important to you. Your secure, personal website is available via desktop or mobile technology and allows you to track your progress against the goals set up by you and your financial advisor. And perhaps most importantly, you never have to worry about your information being shared with online advertisers and other service providers. Your client portal provides you with:

- **Tracking** of all financial account balances, with assets updated nightly.
- **Alerts** to detect significant changes in account balances.
- **Investment Research** with the click of a button.



- **Secure storage** of the information most important to you, including wills, tax returns, medical histories, precious memorabilia and just about anything else.
- **A budget tool** to track all your purchases against your goals.
- **Reports** on cash flow, retirement, investments and more.

You're just a click away from everything you need, whenever you want it, from wherever you are.

## Your Personal Financial Website

### Investments Page

Interactive charts and detailed views provide a clear picture of accounts.

### Interactive Design

Your complete financial picture comes to life.

### Intraday Price Updates

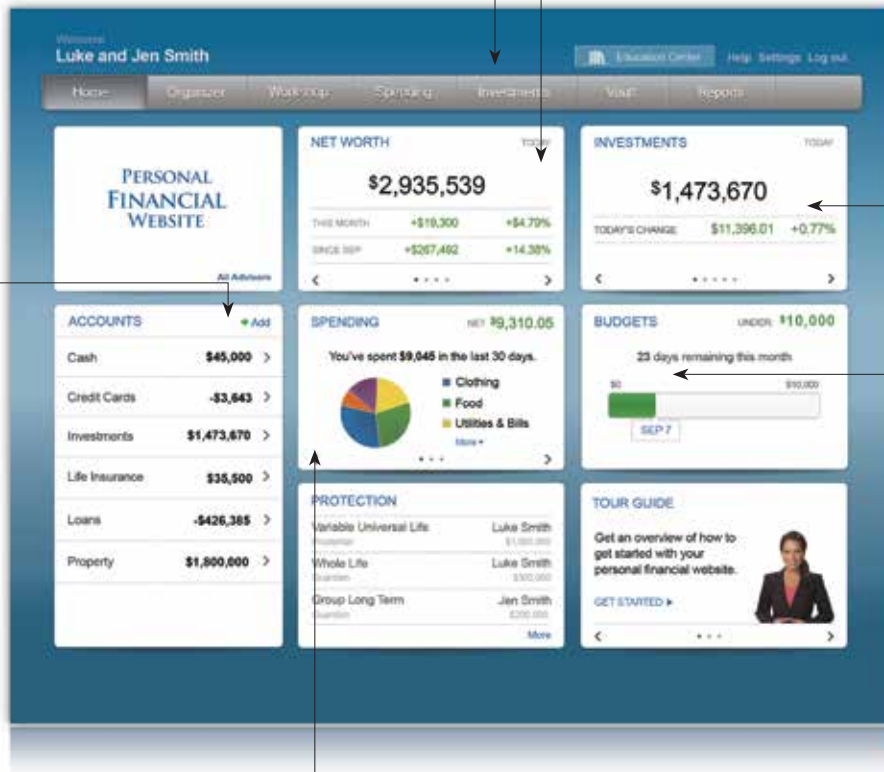
Investment prices update throughout the day, not just nightly.

### Financial Connections

Intuitive data entry makes it easy for you to connect your accounts.

### Budgeting Tools

You can track your progress in reaching your goals.



### Track Spending

Bank and credit card transactions import so you can see what you are spending. You can also create custom categories to track your spending.

### Awards Manager

Track frequent flyer miles, hotel rewards and credit card points, and get alerted before they expire.

### Educational Library

Videos and articles to build your financial knowledge.



## Simplify your finances. Spend more time on what's important.

If you are looking to take the complexity out of managing your finances, it would be our pleasure to talk to you about accessing your comprehensive financial picture on your personal website today.

To the extent you are receiving investment advice from a separately registered independent investment advisor, please note that LPL Financial is not an affiliate of and makes no representation with respect to such entity.

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|--|----------------------------------|---------------------------------|
| Not FDIC/NCUA Insured                        | Not Bank/Credit Union Guaranteed | May Lose Value                  |
| Not Insured by any Federal Government Agency |                                  | Not a Bank/Credit Union Deposit |