SELECT LINK INFORMATION
DECEMBER 2006

Many of our clients have multiple accounts within their households. For example: you might have an individual brokerage account for you and your spouse, retirement accounts, checking, and accounts for your children etc. Managing all of these accounts can be quite complicated and often time consuming. ***SelectLink*** is a feature that clients can utilize which gives a complete financial picture that will help clients to organize and track household finances. This complimentary service will link all of your accounts that share the same mailing address and as a result ***SelectLink*** consolidates all of your household statements, prepares a summary cover page, and mails these documents to you in one package.

Clients can obtain the complete status of all household finances in a single snapshot. The need to calculate aggregate portfolio value by adding the totals of all accounts is nullified. The ***SelectLink*** summary enables you to view the net worth for all of your household accounts. In addition, the ***SelectLink*** summary provides the values and percentages of each asset category in your portfolio (stocks, bonds, and funds).

To sign up for ***SelectLink***, contact us at (888)950-0940.