

A Single Account.  
A Single Statement.  
A Single Vision.

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Take Control by  
Consolidating Your Assets



Has your investment portfolio evolved into one, focused account with a carefully designed plan, or is it a patchwork of accounts, across various financial companies, with no clear goal?

Consolidating your assets can help.

Today's rapidly changing world makes three things crucial for investors: a well-constructed portfolio, a sure grasp of the components within that portfolio, and timely, informed decisions that address short- and long-term objectives.

Gaining that understanding and using it to properly manage and maximize your financial plan requires a holistic approach to both your portfolio and your plan.

### Maximize the Potential of Your Financial Strategy

Consolidating your investment portfolio into a single brokerage account that you and your investment professional can regularly monitor may benefit you.

- > **See the Financial “Big Picture.”** Instead of having to make sense of your financial picture from multiple statements, consolidating your portfolio offers you the ability to see your investment choices in one concise statement. You and your investment professional can use it to more efficiently and effectively view, track and monitor your financial strategy and how it is meeting your needs.
- > **Take Control with Less Paper.** Fewer accounts and one monthly or quarterly statement (based on your activity) mean less paperwork. A single statement can also help simplify your year-end tax reporting. In addition, you can choose to “go paperless” by accessing your statements and trade confirmations electronically via [mydocumentsuite.com](http://mydocumentsuite.com)<sup>™</sup> or your financial organization's online services.
- > **Benefit from Convenient Account Access.** Currently, you may find yourself visiting multiple mutual fund websites to keep track of your portfolio. Through a brokerage account and your financial organization's online services, you will have day and night access, with a single login, to all of your consolidated account information: brokerage account statements, tax statements and trade confirmations.

No matter how simple or complex your financial strategy is, a brokerage account can provide you with a broad range of investment opportunities.

- > **Enjoy Enhanced Service.** With your assets combined into a single account, client service is centralized, so you may be able to expect improved response times to your requests and an enhanced overall experience.
- > **Experience the Power of Combining Assets.** Combining your assets provides you and your investment professional a more holistic view of your portfolio for more effective asset allocation. Consolidation also simplifies access to a variety of investments, such as mutual funds, annuities, alternative investments, stocks, bonds and exchange-traded funds, and enables you to more easily diversify your holdings to keep your intended financial strategy on track.

To learn more about the benefits of consolidating your investment portfolio into a single brokerage account, contact your investment professional today.

## MEMBER OF THE SECURITIES INVESTOR PROTECTION CORPORATION

The Securities Investor Protection Corporation (SIPC®) protects securities customers of its members up to \$500,000 (including \$250,000 for claims for cash). An explanatory brochure is available upon request at [www.sipc.org](http://www.sipc.org). SIPC does not protect against loss due to market fluctuation. Your firm's clearing provider also provides coverage in excess of SIPC limits through a private insurer, Lloyd's of London. The Lloyd's of London insurance does not protect against loss due to market fluctuation. Additional information can be found at [www.lloyds.com](http://www.lloyds.com).

