

Custom Table Guide

Add/Remove Columns

- Hover your mouse over any column header and select the arrow bar.
- Hover over **Columns** to display the list of available categories and make your selections. Checked categories are displayed as column headers.

Sort Columns

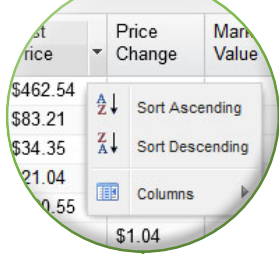
- Hover your mouse over any column header and select the arrow bar.
- Sort a column by selecting one of the sort options, or by single clicking on the desired column header. (The sorted column will be highlighted with an arrow indicating whether it's in ascending or descending order.)

Download & Print

- The Print button will print the display as seen on your screen.
- Select Download to export the table of data as a .CSV file.
- View the .CSV in spreadsheet format by opening with Excel or a similar program.
- You can now print all holdings from the spreadsheet.

Results Summary

- Displays the aggregated data for the table.



[View Guide](#) for customizable table functionality.

[Tax FAQs](#) [Holdings FAQs](#) [Download](#) [Print](#)

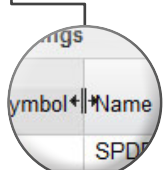
Holdings Summary

	Securities	Market Value	Day's Gain	Day's Gain %	Taxable Gain	Taxable Gain %
Totals	23	\$1,672.61	\$1.15	0.07%	N/A	N/A

Holdings

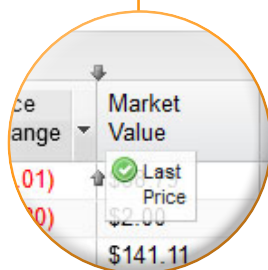
Show Tax View [Reset View](#)

Symbol	Name	Shares	Last Price	Price Change	Market Value	Day's Gain	Day's Gain %	Taxable Gain	Taxable Gain %	Current Weight
BIL	SPDR BARCLAYS CAPITAL ...	1.93897	\$45.79	(\$0.01)	\$88.79	(\$0.02)	(0.02%)	(\$0.14)	(0.16%)	5.31%
BIV	VANGUARD INTERMEDIATE...	0.02411	\$82.86	(\$0.80)	\$2.00	(\$0.02)	(0.96%)	\$0.00	0.00%	0.12%
BND	VANGUARD TOTAL BOND M...	1.75375	\$80.46	(\$0.56)	\$141.11	(\$0.98)	(0.69%)	(\$2.22)	(1.55%)	8.44%
DBC	POWERSHARES DB COMM...	0.69284	\$25.99	\$0.06	\$18.01	\$0.04	0.23%	\$0.01	0.06%	1.08%
DJP	IPATH DOW JONES-UBS CO...	0.14157	\$36.97	(\$0.04)	\$5.23	(\$0.01)	(0.11%)	(\$1.38)	(20.85%)	0.31%
EDV	VANGUARD EXTENDED DU...	0.18886	\$94.46	(\$2.94)	\$17.84	(\$0.55)	(3.02%)	(\$0.16)	(0.89%)	1.07%
EWM	ISHARES MSCI MALAYSIA I...	0.19918	\$15.29	\$0.18	\$3.05	\$0.04	1.19%	\$0.25	8.96%	0.18%
EWZ	ISHARES MSCI BRAZIL IND...	0.13692	\$43.89	\$0.39	\$6.01	\$0.05	0.90%	\$0.01	0.17%	0.36%
IGE	ISHARES S&P NORTH AME...	0.05363	\$41.18	\$0.60	\$2.21	\$0.03	1.48%	(\$0.17)	(7.14%)	0.13%
LQD	ISHARES IBOX \$ INVESTM...	0.07296	\$113.28	(\$1.26)	\$8.26	(\$0.09)	(1.10%)	\$0.23	2.86%	0.49%
PRIV...	PRIVATETEST	100.00000	\$10.00	\$0.00	\$1,000.00	\$0.00	0.00%	N/A	N/A	59.79%
PZA	POWERSHARES INSURED ...	0.56399	\$23.08	\$0.04	\$13.02	\$0.02	0.17%	\$0.02	0.15%	0.78%
QQQ	POWERSHARES QQQ TRU...	0.11176	\$76.54	\$0.77	\$8.55	\$0.09	1.02%	\$2.11	32.76%	0.51%
RWR	SPDR DOW JONES REIT ETF	0.52462	\$76.24	(\$0.26)	\$40.00	(\$0.14)	(0.34%)	\$9.23	30.00%	2.39%



Change Column Width

- Hover your mouse over the seam between two column headers. The cursor will change to a resizing cursor. Drag the seam left or right and release when you've reached the desired column width.



Move Columns

- Select the column header you would like to move, and drag it to the desired location. Arrows will appear above and below the seam. Release the column into its new location.

Reset

- Select the reset button to restore default display and column organization.