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Advisors @ M&T

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The Consolidated Portfolio Summary provides a high-level view of all your LPL Financial accounts.

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The first page of an Account Statement gives you a high-level view of your account and any changes in value that have occurred during the period. The format of the Account-Level Summary is similar to that of the Consolidated Portfolio Summary, so they are easy to reconcile.

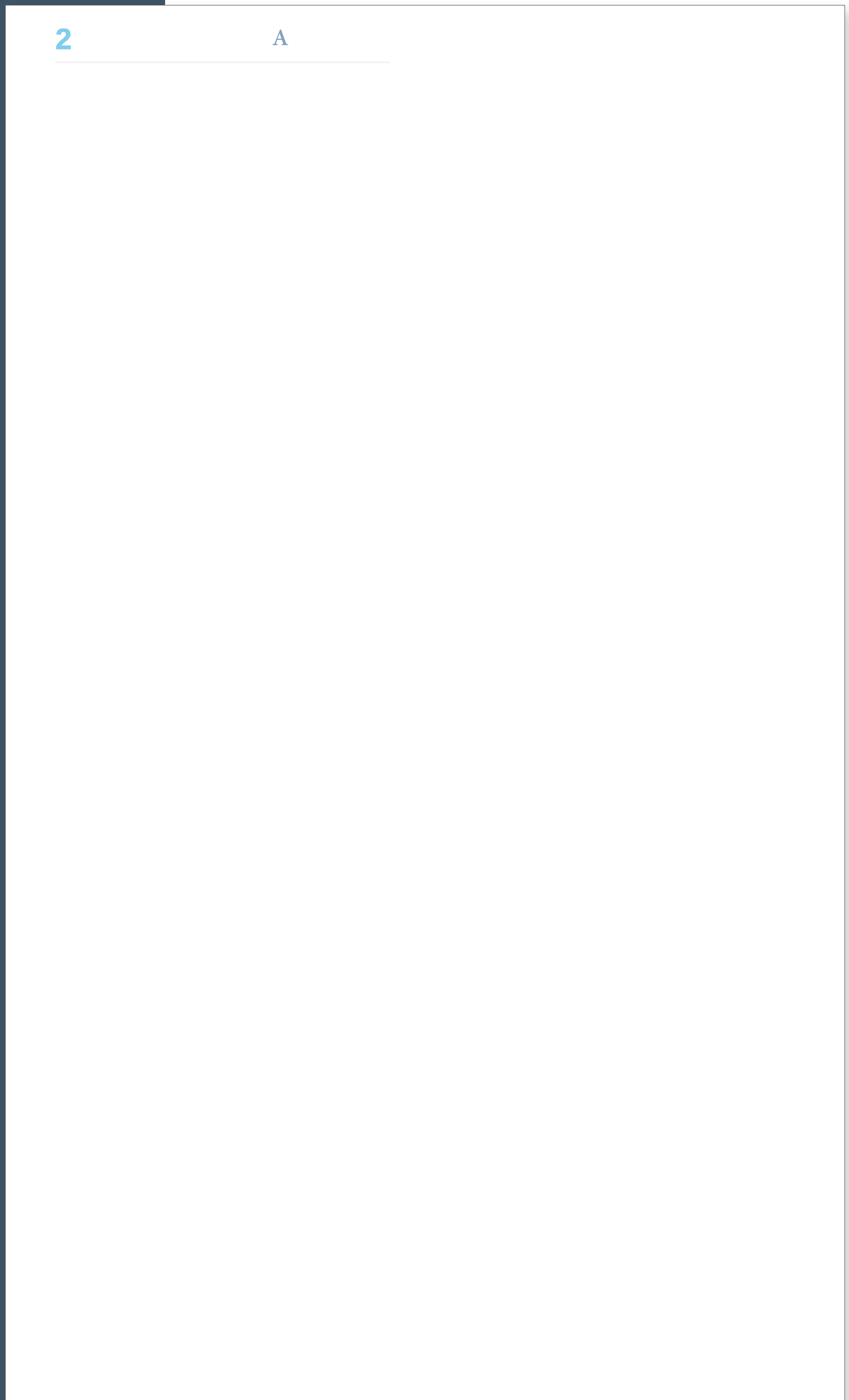
The following pages—Account Holdings and Account Activity—supply the details behind the numbers found in your Account Summary.

I Displays the investment objective for the account in a graphical format.

A Shows activity information for the the investment accounts year to date and current quarter.

G /L Summarizes the realized and unrealized gains and losses for non-retirement accounts. For retirement accounts, a Retirement Summary appears here (example on number 5).

A A Summarizes the account's asset allocation in list and graphical pie chart formats.



In the Account Activity section, the transactions and other activities that have occurred in your account during the month are summarized by type.