GET A MORE COMPLETE FINANCIAL PICTURE WITH THE ENHANCED MY NET WORTH TOOL

Janney’s My Net Worth, our financial aggregation tool, now features new functionality—including Zillow Zestimate®—and a variety of new enhancements to make using the tool easier than ever.

With My Net Worth (found under the Portfolio & Planning tab on Online Access), you can review your current Janney accounts and add your outside accounts for a single online view of your net worth. Together with your Janney Financial Advisor, you can determine how each aspect of your financial life can work together toward your goals.

And now, you’ll benefit from exciting upgrades on these My Net Worth pages:

- **Zillow Zestimate®** allows you to obtain estimates of your home or commercial property’s market value.

- **Account Management**
  - Improved navigation with an updated look
  - Improved notifications and status messages regarding connection issues

- Easier connections to a Bank/Credit Card, Investment Institution, or Manual Entry

- Recognizable bank connection (similar to Venmo), so you can better understand how to add banks

ONLINE RESOURCES AT JANNEY

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Manual Account Entry

- Zillow Zestimate for estimates of your home or commercial property’s market value
- Expanded Asset and Liability Entry (six different categories)
- Enhanced navigation to Manual Entry categories

Expenses

- Easier navigation with an updated view that reduces clutter
- New calculated 30-Day Budget feature with hundreds of spending categories
- Comprehensive view of monthly spend vs. category spend
- Ability to update or delete transaction categories

WORKING WITH JANNEY

For more information about Janney, please see Janney’s Relationship Summary (Form CRS) on www.janney.com/crs which details all material facts about the scope and terms of our relationship with you and any potential conflicts of interest.

NEED ASSISTANCE?

Contact our Online Services team with questions, or if you’d like additional support. To allow for more efficient assistance, please have your Janney account information handy.

Phone: 888.882.0012
Email: OnlineServices@janney.com

Monday through Friday: 7AM – 7PM EST
Saturday, Sunday, and Holidays: 7AM – 12PM EST

By establishing a relationship with a Janney Financial Advisor, we can build a tailored financial plan and make recommendations about solutions that are aligned with your best interest and unique needs, goals, and preferences.

Contact us today to discuss how we can put a plan in place designed to help you reach your financial goals.