MY NET WORTH: FACILITATING BETTER DECISIONS WITH A MORE HOLISTIC PERSPECTIVE

The best decisions emerge when you're able to consider all the aspects that can affect them. That's why, when it comes to making financial-planning and investment decisions, it's so vital to look at all your portfolios holistically.

Doing so gives you a clearer sense of your asset mix so that you and your Financial Advisor can get a better handle on your risk exposures and identify opportunities to help move you toward your financial goals.

With My Net Worth (in the Portfolio & Planning area of Online Access), not only is your information all integrated in one central place, it's also accessible on your time, wherever you are, securely through whatever device you choose.

SECURE ACCESS ON YOUR TIME, IN YOUR PLACE

You don't have to go to multiple financial sites using multiple passwords to view your account information.

With My Net Worth's secure single sign-on, you can access everything in one place.

HOLISTIC PICTURE PROMOTES MORE INFORMED DECISION-MAKING

You get a comprehensive view of all your finances held inside and outside of Janney, including bank, investment, and credit card accounts. With a more comprehensive asset-allocation view, you can confirm that your combined risk profile matches your tolerance—or identify where you might be taking on a different level of risk than you want

STAYING CURRENT WITH FINANCIAL GOAL PROGRESS

You can check how you're advancing toward specific financial goals, such as saving for retirement, making education dreams come true for loved ones, or even starting a business.

NET WORTH OVER TIME

Monitor your assets (investments, bank accounts) and liabilities (credit card and loan accounts) as your net worth changes daily. Also, review how your net worth has changed—and ideally grown—over the longer term.

ASSET ALLOCATION

View your total asset allocation among your accounts by broad asset class, size/style, and sector breakdown. See holdings in each account or combine them into a single view for a clearer risk-management picture.

EXPENSES

Planning for and monitoring expenses is a vital step in progressing toward your financial goals. Set budgets for expenses, track progress toward future goals, analyze cash flow into and out of accounts, and request transfers of outside assets into Janney.

COMBINED ACTIVITY

View investment and cash transactions across all accounts. Sort by transaction type, and filter by set or custom time frames.

CASH FLOW

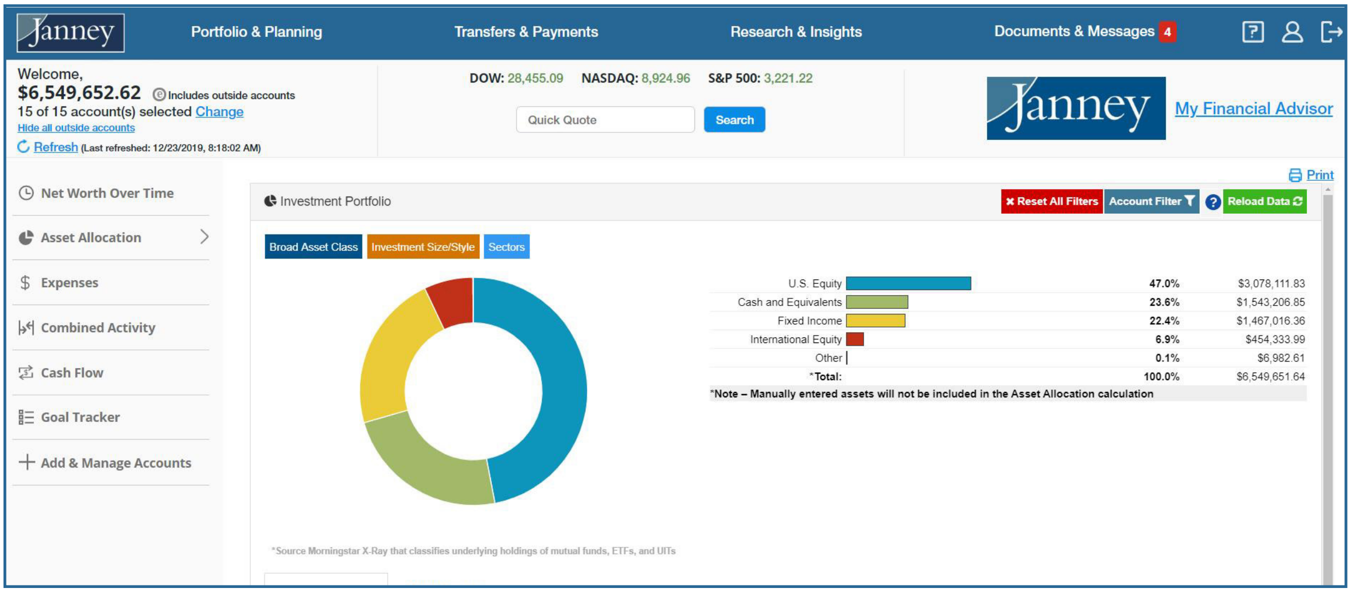
Gain more insight into your cash-flow trends. When do you commonly make deposits or receive interest payments? When do you tend to make withdrawals and around which expenses or requirements are they based?

GOAL TRACKER

Check how you're progressing toward the financial goals you've designated. Confirm where you're on track—and identify topics to discuss with your Financial Advisor.

FACILITATING BETTER FINANCIAL PLANNING CONVERSATIONS

We often think of individual financial goals in silos, but one goal can affect another. Because your Financial Advisor also sees your more complete financial picture, you can get more well-rounded insights and advice—perhaps even on goals your Financial Advisor became aware you had after seeing this holistic view.



JANNEY'S ONLINE SERVICES TEAM IS HERE TO HELP

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

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