TFG Portal Your Finances. One Place.

Velcome,							
Frank and Joanna Mille	r						
Accounts	+ Add Account	Net Worth	•	Investments		0	
		\$4,940,932		\$3,642,823 as of tod	ay		
Cash	\$79,568 🗸	as of today		Asset Allocation			
				Equities	\$2.5M	67.72%	
			↑ \$16,563 year to date	Taxable Bonds	\$784,433	21.65%	
Credit Cards	-\$1,275 🗸			Tax Exempt Bonds	\$262,243	7.24%	
Taxable	\$1,353,717 🗸						
		Spending				View All	
Tax Advantaged	\$2,154,807 🗸						
		\$12,526 Income	\$5,75 Expe	57.38	+\$6,768.62 Net		
Life Ins Cash Values	\$35,500 ~	income	Expe	nses			
Loans	-\$326,385 ~	Overall Budget				96.61 of \$9.012	
Louis		Overall Budget	erall Budget			90.61 01 39,012	
Property	\$1,645,000 🗸						
		Recent Transactions				Amounts	
Stock Options	\$0 ~	27 Cash Withdrawal			-\$250		
		35 STRIDE RITE					



CONSOLIDATED VIEW

Connect all accounts for a consolidated view of your entire financial picture.



BALANCE SHEET

View updated assets, liabilities, and net worth balances for a full personal balance sheet.



SPENDING

Monitor transactions and spending categories to stay up to date.



INVESTMENTS View your investment account

balances and allocations.



DOCUMENT STORAGE

Store important documents within the secure vault.



QUARTERLY STATEMENTS

Access your quarterly statement online anytime and anywhere from the secure vault.

For additional information, visit tfginvest.com/client-portal.

