

Search reports

DELETE

Updated 11:33 [REFRESH](#) [COLUMNS](#)

<input type="checkbox"/>	REPORT TITLE	RELATIONSHIP	GENERATED BY	STATUS	GENERATION DETAILS	REPORTING PERIOD	COMMENT
<input type="checkbox"/>	Asset Allocation Modular Report	John InView AR3954639765	Joseph Reynolds JR44587	Generated	Start: 28 Nov 2017 08:53 AM End: 28 Nov 2017 08:53 AM	31 Oct 2017 to 27 Nov 2017	Lorem ipsum consectetur
<input type="checkbox"/>	Client Summary Report On Demand Reports	Gagandeep Singh AR3954639765	Phillip Watson PW12345	Generated	Start: 28 Nov 2017 08:53 AM End: 28 Nov 2017 08:53 AM	31 Oct 2017 to 27 Nov 2017	Lorem ipsum consectetur
<input type="checkbox"/>	Custom Investment Summary Report V1 On Demand Reports	Johnny Steve InView AR3954639765	Regina Spector RS12345	Generated	Start: 28 Nov 2017 08:53 AM End: 28 Nov 2017 08:53 AM	31 Oct 2017 to 27 Nov 2017	
<input type="checkbox"/>	Custom Investment Summary Report V1 On Demand Reports	Jane InView AR3954639765	Keith Richards KR12345	Generated	Start: 28 Nov 2017 08:53 AM End: 28 Nov 2017 08:53 AM	31 Oct 2017 to 27 Nov 2017	
<input type="checkbox"/>	On Demand Relationship Report On Demand Reports	Jeewon Shin AR3954639765	Yin Liu YL12345	Generated	Start: 28 Nov 2017 08:53 AM End: 28 Nov 2017 08:53 AM	31 Oct 2017 to 27 Nov 2017	
<input type="checkbox"/>	On Demand Relationship Report On Demand Reports	Joseph Reynolds AR3954639765	Margaret Pak MP12345	Generated	Start: 28 Nov 2017 08:53 AM End: 28 Nov 2017 08:53 AM	31 Oct 2017 to 27 Nov 2017	Lorem ipsum consectetur
<input type="checkbox"/>	On Demand Relationship Report On Demand Reports	Yin Liu AR3954639765	Andrea Manucci AM12345	Generated	Start: 28 Nov 2017 08:53 AM End: 28 Nov 2017 08:53 AM	31 Oct 2017 to 27 Nov 2017	
<input type="checkbox"/>	Client Summary Report On Demand Reports	Nai Ping Xing AR3954639765	Sal Florentino SF12345	Generated	Start: 28 Nov 2017 08:53 AM End: 28 Nov 2017 08:53 AM	31 Oct 2017 to 27 Nov 2017	
<input type="checkbox"/>	Client Summary Report On Demand Reports	Christopher Gammon AR3954639765	John Chang JC12345	Generated	Start: 28 Nov 2017 08:53 AM End: 28 Nov 2017 08:53 AM	31 Oct 2017 to 27 Nov 2017	Lorem ipsum consectetur
<input type="checkbox"/>	On Demand Relationship Report On Demand Reports	Gurpreet Sachdeva AR3954639765	Samantha Caragulo SC12345	Generated	Start: 28 Nov 2017 08:53 AM End: 28 Nov 2017 08:53 AM	31 Oct 2017 to 27 Nov 2017	Lorem ipsum consectetur
<input type="checkbox"/>	Client Summary Report On Demand Reports	Richard Valenz AR3954639765	Vincent Guliani VG12345	Generated	Start: 28 Nov 2017 08:53 AM End: 28 Nov 2017 08:53 AM	31 Oct 2017 to 27 Nov 2017	
<input type="checkbox"/>	On Demand Relationship Report On Demand Reports	Malcolm Crawford III AR3954639765	Elizabeth Briggs EB12345	Generated	Start: 28 Nov 2017 08:53 AM End: 28 Nov 2017 08:53 AM	31 Oct 2017 to 27 Nov 2017	
<input type="checkbox"/>	Custom Investment Summary Report V1 On Demand Reports	Richard Burton II AR3954639765	Chase Wells CW12345	Generated	Start: 28 Nov 2017 08:53 AM End: 28 Nov 2017 08:53 AM	31 Oct 2017 to 27 Nov 2017	
<input type="checkbox"/>	Client Summary Report On Demand Reports	Andrew Warhol AR3954639765	Meiomi Neelson MN12345	Generated	Start: 28 Nov 2017 08:53 AM End: 28 Nov 2017 08:53 AM	31 Oct 2017 to 27 Nov 2017	

Patricia V.O Hunter

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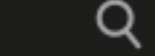
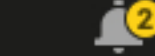
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<input type="checkbox"/>	Client Summary Report On Demand Reports	Gagandeep Singh AR3954639765	Generated	Start: 28 Nov 2017 08:53 AM End: 28 Nov 2017 08:53 AM	31 Oct 2017 to 27 Nov 2017	Lorem ipsum consectetur a
<input type="checkbox"/>	Custom Investment Summary Report V1 On Demand Reports	Johnny Steve InView AR3954639765	Generated	Start: 28 Nov 2017 08:53 AM End: 28 Nov 2017 08:53 AM	31 Oct 2017 to 27 Nov 2017	
<input type="checkbox"/>	Custom Investment Summary Report V1 On Demand Reports	Jane InView AR3954639765	Generated	Start: 28 Nov 2017 08:53 AM End: 28 Nov 2017 08:53 AM	31 Oct 2017 to 27 Nov 2017	
<input type="checkbox"/>	On Demand Relationship Report On Demand Reports	Jeewon Shin AR3954639765	Generated	Start: 28 Nov 2017 08:53 AM End: 28 Nov 2017 08:53 AM	31 Oct 2017 to 27 Nov 2017	
<input type="checkbox"/>	On Demand Relationship Report On Demand Reports	Joseph Reynolds AR3954639765	Generated	Start: 28 Nov 2017 08:53 AM End: 28 Nov 2017 08:53 AM	31 Oct 2017 to 27 Nov 2017	Lorem ipsum consectetur a
<input type="checkbox"/>	On Demand Relationship Report On Demand Reports	Yin Liu AR3954639765	Generated	Start: 28 Nov 2017 08:53 AM End: 28 Nov 2017 08:53 AM	31 Oct 2017 to 27 Nov 2017	
<input type="checkbox"/>	Client Summary Report On Demand Reports	Nai Ping Xing AR3954639765	Generated	Start: 28 Nov 2017 08:53 AM End: 28 Nov 2017 08:53 AM	31 Oct 2017 to 27 Nov 2017	
<input type="checkbox"/>	Client Summary Report On Demand Reports	Christopher Gammon AR3954639765	Generated	Start: 28 Nov 2017 08:53 AM End: 28 Nov 2017 08:53 AM	31 Oct 2017 to 27 Nov 2017	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do.
<input type="checkbox"/>	On Demand Relationship Report On Demand Reports	Gurpreet Sachdeva AR3954639765	Generated	Start: 28 Nov 2017 08:53 AM End: 28 Nov 2017 08:53 AM	31 Oct 2017 to 27 Nov 2017	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do.
<input type="checkbox"/>	Client Summary Report On Demand Reports	Richard Valenz AR3954639765	Generated	Start: 28 Nov 2017 08:53 AM End: 28 Nov 2017 08:53 AM	31 Oct 2017 to 27 Nov 2017	
<input type="checkbox"/>	On Demand Relationship Report On Demand Reports	Malcolm Crawford III AR3954639765	Generated	Start: 28 Nov 2017 08:53 AM End: 28 Nov 2017 08:53 AM	31 Oct 2017 to 27 Nov 2017	
<input type="checkbox"/>	Custom Investment Summary Report V1 On Demand Reports	Richard Burton II AR3954639765	Generated	Start: 28 Nov 2017 08:53 AM End: 28 Nov 2017 08:53 AM	31 Oct 2017 to 27 Nov 2017	
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- View Report
- View Details
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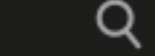
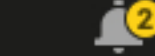
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<input type="checkbox"/>	Client Summary Report On Demand Reports	Gagandeep Singh AR3954639765	Generated	Start: 28 Nov 2017 08:53 AM End: 28 Nov 2017 08:53 AM	31 Oct 2017 to 27 Nov 2017	Lorem ipsum consectetur a
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<input type="checkbox"/>	Custom Investment Summary Report V1 On Demand Reports	Jane InView AR3954639765	Generated	Start: 28 Nov 2017 08:53 AM End: 28 Nov 2017 08:53 AM	31 Oct 2017 to 27 Nov 2017	
<input type="checkbox"/>	On Demand Relationship Report On Demand Reports	Jeewon Shin AR3954639765	Generated	Start: 28 Nov 2017 08:53 AM End: 28 Nov 2017 08:53 AM	31 Oct 2017 to 27 Nov 2017	
<input type="checkbox"/>	On Demand Relationship Report On Demand Reports	Joseph Reynolds AR3954639765	Generated	Start: 28 Nov 2017 08:53 AM End: 28 Nov 2017 08:53 AM	31 Oct 2017 to 27 Nov 2017	Lorem ipsum consectetur a
<input type="checkbox"/>	On Demand Relationship Report On Demand Reports	Yin Liu AR3954639765	Generated	Start: 28 Nov 2017 08:53 AM End: 28 Nov 2017 08:53 AM	31 Oct 2017 to 27 Nov 2017	
<input type="checkbox"/>	Client Summary Report On Demand Reports	Nai Ping Xing AR3954639765	Generated	Start: 28 Nov 2017 08:53 AM End: 28 Nov 2017 08:53 AM	31 Oct 2017 to 27 Nov 2017	
<input type="checkbox"/>	Client Summary Report On Demand Reports	Christopher Gammon AR3954639765	Generated	Start: 28 Nov 2017 08:53 AM End: 28 Nov 2017 08:53 AM	31 Oct 2017 to 27 Nov 2017	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do.
<input type="checkbox"/>	On Demand Relationship Report On Demand Reports	Gurpreet Sachdeva AR3954639765	Generated	Start: 28 Nov 2017 08:53 AM End: 28 Nov 2017 08:53 AM	31 Oct 2017 to 27 Nov 2017	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do.
<input type="checkbox"/>	Client Summary Report On Demand Reports	Richard Valenz AR3954639765	Generated	Start: 28 Nov 2017 08:53 AM End: 28 Nov 2017 08:53 AM	31 Oct 2017 to 27 Nov 2017	
<input type="checkbox"/>	On Demand Relationship Report On Demand Reports	Malcolm Crawford III AR3954639765	Generated	Start: 28 Nov 2017 08:53 AM End: 28 Nov 2017 08:53 AM	31 Oct 2017 to 27 Nov 2017	
<input type="checkbox"/>	Custom Investment Summary Report V1 On Demand Reports	Richard Burton II AR3954639765	Generated	Start: 28 Nov 2017 08:53 AM End: 28 Nov 2017 08:53 AM	31 Oct 2017 to 27 Nov 2017	
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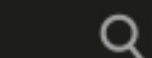
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<input type="checkbox"/>	Client Summary Report On Demand Reports	Gagandeep Singh AR3954639765	Generated	Start: 28 Nov 2017 08:53 AM End: 28 Nov 2017 08:53 AM	31 Oct 2017 to 27 Nov 2017
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<input type="checkbox"/>	On Demand Relationship Report On Demand Reports	Jeewon Shin AR3954639765	Generated	Start: 28 Nov 2017 08:53 AM End: 28 Nov 2017 08:53 AM	31 Oct 2017 to 27 Nov 2017
<input type="checkbox"/>	On Demand Relationship Report On Demand Reports	Joseph Reynolds AR3954639765	Generated	Start: 28 Nov 2017 08:53 AM End: 28 Nov 2017 08:53 AM	31 Oct 2017 to 27 Nov 2017
<input type="checkbox"/>	On Demand Relationship Report On Demand Reports	Yin Liu AR3954639765	Generated	Start: 28 Nov 2017 08:53 AM End: 28 Nov 2017 08:53 AM	31 Oct 2017 to 27 Nov 2017
<input type="checkbox"/>	Client Summary Report On Demand Reports	Nai Ping Xing AR3954639765	Generated	Start: 28 Nov 2017 08:53 AM End: 28 Nov 2017 08:53 AM	31 Oct 2017 to 27 Nov 2017
<input type="checkbox"/>	Client Summary Report On Demand Reports	Christopher Gammon AR3954639765	Generated	Start: 28 Nov 2017 08:53 AM End: 28 Nov 2017 08:53 AM	31 Oct 2017 to 27 Nov 2017
<input type="checkbox"/>	On Demand Relationship Report On Demand Reports	Gurpreet Sachdeva AR3954639765	Generated	Start: 28 Nov 2017 08:53 AM End: 28 Nov 2017 08:53 AM	31 Oct 2017 to 27 Nov 2017
<input type="checkbox"/>	Client Summary Report On Demand Reports	Richard Valenz AR3954639765	Generated	Start: 28 Nov 2017 08:53 AM End: 28 Nov 2017 08:53 AM	31 Oct 2017 to 27 Nov 2017
<input type="checkbox"/>	On Demand Relationship Report On Demand Reports	Malcolm Crawford III AR3954639765	Generated	Start: 28 Nov 2017 08:53 AM End: 28 Nov 2017 08:53 AM	31 Oct 2017 to 27 Nov 2017
<input type="checkbox"/>	Custom Investment Summary Report V1 On Demand Reports	Richard Burton II AR3954639765	Generated	Start: 28 Nov 2017 08:53 AM End: 28 Nov 2017 08:53 AM	31 Oct 2017 to 27 Nov 2017
<input type="checkbox"/>	Client Summary Report On Demand Reports	Andrew Warhol AR3954639765	Generated	Start: 28 Nov 2017 08:53 AM End: 28 Nov 2017 08:53 AM	31 Oct 2017 to 27 Nov 2017

Modular Report

Custom Name 123 can be displayed in two lines

GROUP OR ACCOUNT	OPTIONS
Financial Summary	<ul style="list-style-type: none"> Portfolio Summary Change in Value Regional Allocation and Total Investment Year To Date
Asset Allocation	<ul style="list-style-type: none"> Asset Class and Asset Sub Class
Asset Allocation Over Time	<ul style="list-style-type: none"> Asset Class and Asset Sub Class Display Market Values Display Bar Chart Last 10 Months
Performance Time Periods (TWR)	<ul style="list-style-type: none"> Current Month End 01 Dec 2017 to 10 Dec 2017 Last 12 Months YTD Since Inception

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Add/Remove Columns



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<input type="checkbox"/>	REPORT TITLE -
<input type="checkbox"/>	Asset Allocation Modular Report
<input type="checkbox"/>	Client Summary Report On Demand Reports
<input type="checkbox"/>	Custom Investment Summary Report V1 On Demand Reports
<input type="checkbox"/>	Custom Investment Summary Report V1 On Demand Reports
<input type="checkbox"/>	On Demand Relationship Report On Demand Reports
<input type="checkbox"/>	On Demand Relationship Report On Demand Reports
<input type="checkbox"/>	On Demand Relationship Report On Demand Reports
<input type="checkbox"/>	On Demand Relationship Report On Demand Reports
<input type="checkbox"/>	Client Summary Report On Demand Reports
<input type="checkbox"/>	Client Summary Report On Demand Reports

Available Columns (click to add)

Search
Generated By →
Currency →
Language →
Branding/Confidentiality →
For Client Use →

Selected Columns

Report Title
× Relationship ↓
× Status ↑ ↓
× Generation Details ↑ ↓
× Reporting Period ↑ ↓
× Comments ↑
Actions

RESTORE TO DEFAULT

CANCEL

APPLY

Modular Report



Custom Name 123 can be displayed in two lines

GROUP OR ACCOUNT

OPTIONS

Financial Summary

Portfolio Summary

Change in Value

Regional Allocation and Total Investment

Year To Date

Asset Allocation

Asset Class and Asset Sub Class

Asset Allocation Over Time

Asset Class and Asset Sub Class

Display Market Values

Display Bar Chart

Last 10 Months

Performance Time Periods (TWR)

Current Month End

01 Dec 2017 to 10 Dec 2017

Last 12 Months

YTD

Since Inception

<input type="checkbox"/>	On Demand Relationship Report On Demand Reports	Gurpreet Sachdeva AR3954639765	Generated	Start: 28 Nov 2017 08:53 AM End: 28 Nov 2017 08:53 AM	31 Oct 2017 to 27 Nov 2017
<input type="checkbox"/>	Client Summary Report On Demand Reports	Richard Valenz AR3954639765	Generated	Start: 28 Nov 2017 08:53 AM End: 28 Nov 2017 08:53 AM	31 Oct 2017 to 27 Nov 2017
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<input type="checkbox"/>	Custom Investment Summary Report V1 On Demand Reports	Richard Burton II AR3954639765	Generated	Start: 28 Nov 2017 08:53 AM End: 28 Nov 2017 08:53 AM	31 Oct 2017 to 27 Nov 2017
<input type="checkbox"/>	Client Summary Report On Demand Reports	Andrew Warhol AR3954639765	Generated	Start: 28 Nov 2017 08:53 AM End: 28 Nov 2017 08:53 AM	31 Oct 2017 to 27 Nov 2017

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<input type="checkbox"/>	On Demand Relationship Report On Demand Reports	Yin Liu AR3954639765	Generated	Start: 28 Nov 2017 08:53 AM End: 28 Nov 2017 08:53 AM	31 Oct 2017 to 27 Nov 2017	
<input type="checkbox"/>	Client Summary Report On Demand Reports	Nai Ping Xing AR3954639765	Generated	Start: 28 Nov 2017 08:53 AM End: 28 Nov 2017 08:53 AM	31 Oct 2017 to 27 Nov 2017	
<input type="checkbox"/>	Client Summary Report On Demand Reports	Christopher Gammon AR3954639765	Generated	Start: 28 Nov 2017 08:53 AM End: 28 Nov 2017 08:53 AM	31 Oct 2017 to 27 Nov 2017	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do.
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VIEW ALL CLIENTS REPORTS

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