• Use Technology to Improve Your Financial Wellness

Personal Capital

A Whole New Way to Track & Manage Your Money



Ftrade - Bank

- FREE App
- Interactive cash flow tools
- Track your investments
- Retirement Planner
- Personalized investment advice
- Investment intelligence
- Uncover hidden fees



Track All Your Accounts Plan for Retirement Monitor Cash Flow Analyze Your Portfolio Retirement Planne ur bank or type its UR Projected Portfolio Value ① r select from these suggestio CHASE O Chase Bank of America re in good shape for ret Events and Goals Wells Fargo Personal Capital \$102,738.90 Capital One - Bank \$28,000/v Savings 63 \$29,680.75 Stock Options - Pandora American Express Cards idelity \$28,854.23 \$0.08 terest Payment Rental Income \$20,000/y citi Citibank New York 529 Plan \$27,518.86 x8107 Personal C Dirdep Xxxx3... \$3,580.00 Home Purchase/Upgrade \$400,000 DISCOVER Discover Card \$15,827.20 88129 Pure Stora Dir Dep Xxxxx... \$1,200.00 Company 401k \$9,000 Trip to Fiji Vork Savings Plan \$12,175.43 USAA \$0.05 terest Payment ersonal Capital \$10,963.18 Vanguard Vanguard \$0.11 terest Payment Olivia's Higher Education \$23,500/y

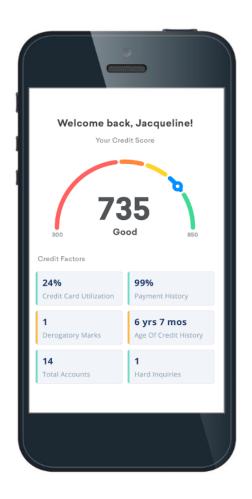
ersonal Capital

\$9,331.72

Credit Karma



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Need assistance with goal planning? Contact an Oswald Financial Advisor at 833.224.5660 or info@oswaldfinancial.com