



# Holdings Dashboard

The Holdings Dashboard has the tools your firm needs to navigate through thousands of accounts, proactively identify issues before they become problems, and leverage the cutting-edge analytics to realign accounts with their Risk Number.

- Select
- Elite
- Ignite
- Ultimate

## Great for advisors, great for your home office

No more 40+ hour weeks spent spot-checking client accounts to ensure that their current holdings match their investment advisory agreement.

Many firms today have so many accounts to review that they only have time to go through a small percentage of their book — leaving hundreds or even thousands of accounts unreviewed. With the Holdings Dashboard, your firm can now ensure no account goes unreviewed, regardless of volume.

RISK	ACCOUNT NAME	RISK ALIGNMENT	INVESTMENT OBJECTIVE	BALANCE	ADVISOR
	Campbell 529 Plan	ALIGNED	Moderate (57-66)	\$42,204	Jonathan Jamison
	Linden Traditional IRA	ALIGNED	Growth (76-83)	\$501,332	Jonathan Jamison
	Skinner Retirement 401K	TOO HIGH (77)	Moderate (57-66)	\$2,122,499	Kevin Takimono
	Hudson Family Trust	ALIGNED	Capital Preservation (1-39)	\$830,228	Jonathan Jamison
	Bernard College Savings	N/A	—	\$17,355	Samantha Landis
	Henderson 401K	TOO LOW (11)	Capital Preservation (1-15)	\$602,225	Kevin Takimono
	Angela Martin's Brokerage	ALIGNED	Moderate Growth (67-75)	\$30,204	Kathy Scott
	Martin Roth IRA	TOO HIGH (77)	Growth (76-83)	\$501,332	Kathy Scott
	Hudson Vacation Fund	TOO HIGH (75)	Conservative Growth (48-56)	\$22,780	Jonathan Jamison
	Hudson IRA	ALIGNED	Moderate Growth (67-75)	\$1,457,223	Jonathan Jamison
		N/A	—	\$73,294	Samantha Landis
		TOO LOW (11)	Capital Preservation (1-15)	\$80,225	Matthew Lin
		ALIGNED	Moderate Growth (67-75)	\$30,204	Matthew Lin
		TOO HIGH (77)	Conservative (40-47)	\$601,411	Kathy Scott

**Risk Alignment**

- TOO HIGH
- TOO LOW
- ALIGNED
- N/A

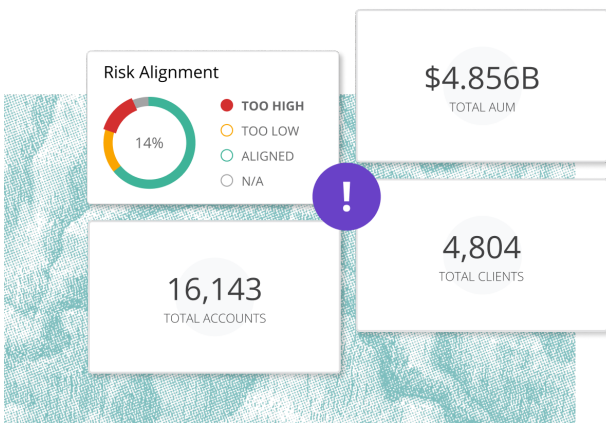
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## View how much of your firm's book is aligned (or misaligned)

Sync your firm's account and household data, define the objective ranges for your firm, and watch as the data is unified into a dynamic, actionable view of your entire book of business. Fly through thousands of accounts and pinpoint just the ones you need to focus on, all with unprecedented ease.

- Need to search by advisor name? You can do it.
- Want to see accounts with a Risk Number of 75-99? Easy.
- Looking for a client that just joined? No problem.

Now you can easily segment every account in your business to find exactly what you are looking for.



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