



Use the **Portfolio Selector** to display balance information about an account or group of accounts in the workspace header.

- Hide or display balance information by selecting Hide / Show
- Customize data elements displayed
 - Click on menu icon 
 - Select or de-select data elements

WINDOW LINKING

- Selecting an account will send that account to linked account windows (select linking icon  to enable/disable)
- Right click on header to launch another account-based window with account in context

FIELD DEFINITIONS

Net Value (Total Balances)	The total of all cash, money accounts and priced securities in your account(s)
Cash & Money Accounts	The total of cash balances and money accounts. May include both settled and unsettled activity.
Cash Available to Invest	The cash available to purchase securities without adding money to your account or borrowing against your securities. In unrestricted accounts, this value includes cash, money market sweep funds, executed trades that have not settled and certain deposits/withdrawals.
Margin Buying Power (margin accounts only)	The amount available to purchase securities without adding money to your account. This value is accurate for purchases of a marginable stock priced greater than \$10 per share, and the value includes cash, money market sweep funds, margin loan availability, executed trades that have not settled and cash deposits/withdrawals. Higher margin requirements for certain securities, including concentrated positions, are not included in this value. Orders for securities with higher margin requirements could reduce the amount of margin buying power available for purchase and may require you to add money to your account.

<p>Pattern day trade account</p>	<p>Accounts in which four or more day trades occur within five consecutive business days are classified as pattern day trader accounts. A day trade occurs when you buy and sell or sell and buy the same security in a margin account on the same day. Financial Industry Regulatory Authority (FINRA) rules require firms to monitor client accounts engaged in day trading, and there are additional requirements for this type of trading.</p> <p>In accounts classified as a pattern day trader accounts, the buying power values assume all opening trades are day trades.</p>
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Investing involves risk. There is always the potential of losing money when you invest in securities.

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Investment products:

<p>Are Not FDIC Insured</p>	<p>Are Not Bank Guaranteed</p>	<p>May Lose Value</p>
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