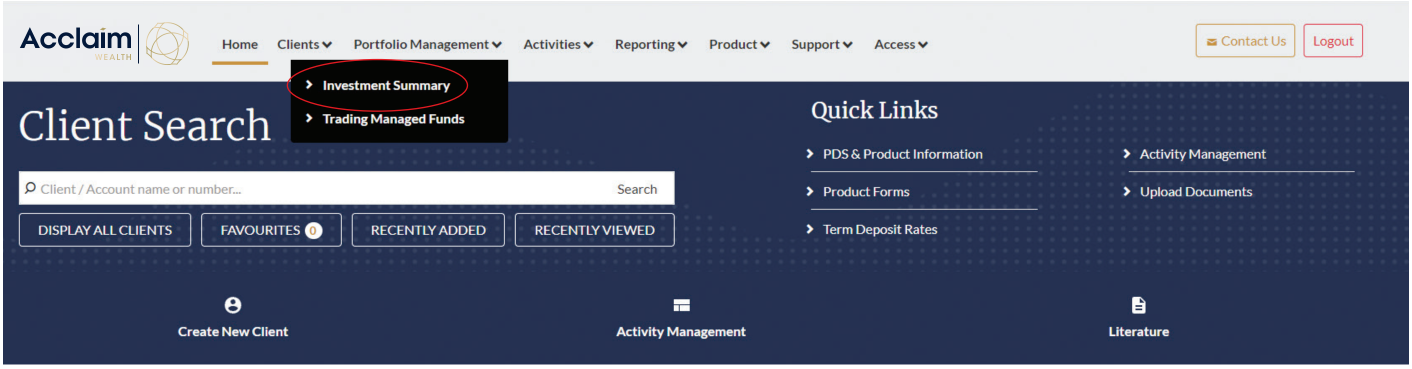
Acclaim WEALTH

Viewing unlisted and listed security balances

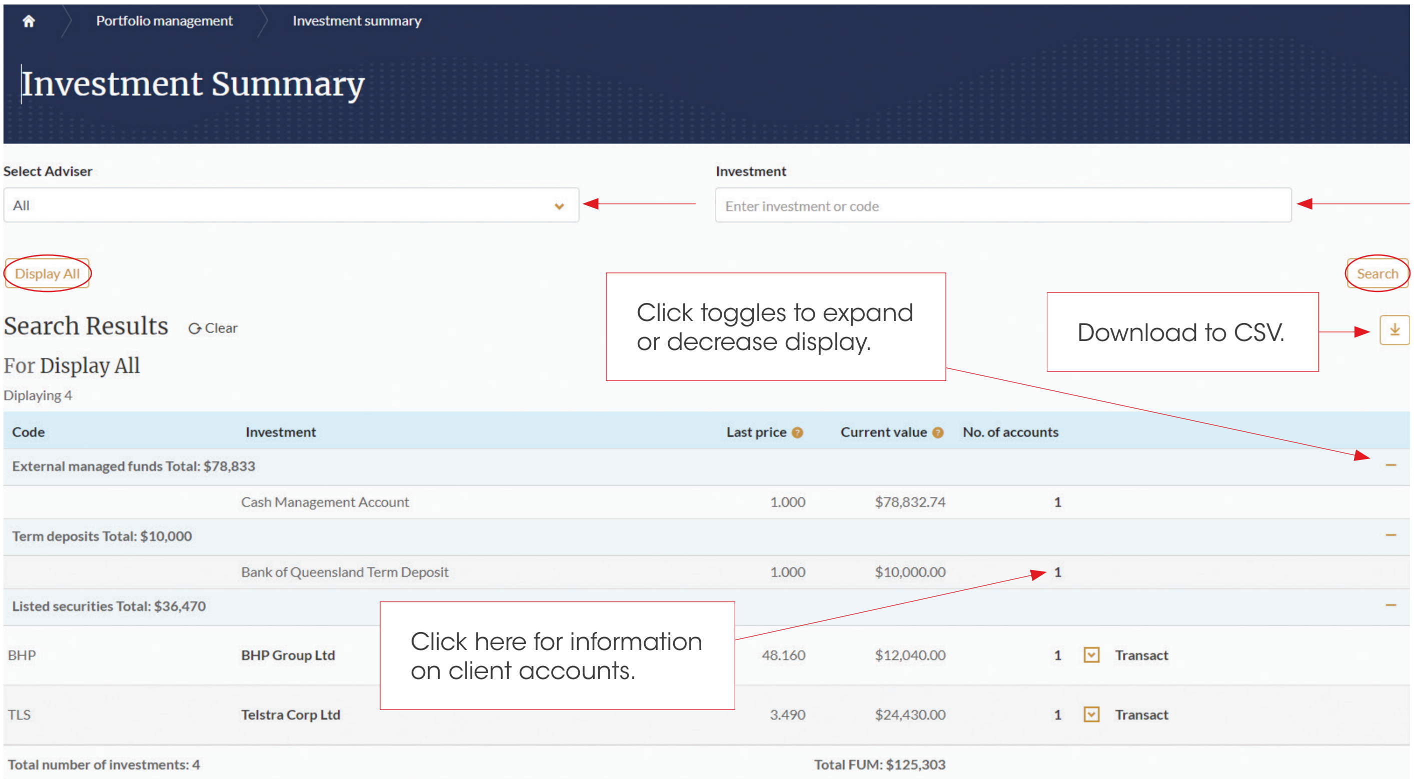
Help Guide

1. Under *Portfolio Management* in the main menu, click 'Investment Summary'.



2. Select the adviser you wish to view – for paraplanners and support staff you may have more than one available - then click **[Display All]**. Alternatively, search via the investment name or code and then click **[Search]**.

3. The screen will display a summarised view of assets.



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