



BOOK TRENDS	EXPLANATION
<p><b>PROFILE</b></p> <p><b>Age and Gender</b> Number of Clients Across Various Age Groups Number of Clients Across Various Age Groups - Chart Statistics</p> <p><b>Account Type</b> Number of Client Accounts by Type Across Various Age Groups Number of Client Accounts by Type Across Various Age Groups - Chart Statistics</p> <p><b>Profile Trends</b> Average AUM per Household Average Net Worth per Household Average Contribution Amount per Client - Of all accounts with Contributions. Average Current Year Income per Client - Of all clients with Incomes.</p>	<p><b>Age and Gender</b> X Axis - Age Ranges: Under 20; 21-30; 31-40; 41-50; 51-60; 61-70; over 70 / Y Axis - Number of Clients Clients listed by men, women and unspecified (no gender given in client profile).</p> <p><b>Account Type</b> X Axis - Age Ranges: Under 20; 21-30; 31-40; 41-50; 51-60; 61-70; over 70 / Y Axis - Number of Accounts Account types listed by number of taxable, tax-deferred and tax-exempt.</p> <p><b>Profile Trends</b> Total Assets Under Management, of all clients, divided by number of client households. Total Net Worth of all clients, divided by number of all client households. Total annual contribution amounts (in the current year only) divided by the number of clients with current year contributions. Total current year income amounts (across income types) divided by current year incomes (per type).</p>



BOOK TRENDS	EXPLANATION
<p><b>PLANS</b></p> <p><b>Plan Type</b>            Number of Clients with/without Plans Across Various Age Groups            Number of Clients with/without Plans Across Various Age Groups - Chart Statistics</p> <p><b>Goal Distribution</b>            Number of Clients with/without Goals Across Various Age Groups            Number of Clients with/without Goals Across Various Age Groups - Chart Statistics</p> <p><b>Goal Type Distribution</b>            Percentage of Clients with Goals Across Various Age Groups            Percentage of Clients with Goals Across Various Age Groups - Chart Statistics</p> <p><b>Plan Trends</b>            Percentage of Households with Tracking Plans            Percentage of Tracking Plans that are within Tolerance            Number of Plans with Allocations to change in the Next Year.            Average Retirement Goal Amount            Average Retirement Goal Starting Age            Average Lifestyle Goal Amount            Average Legacy Goal Amount            Average Education Goal Amount            Average Number of Plans per Household            Percentage of Plans with Retirement Goals            Percentage of Plans with Education Goals            Percentage of Plans with Legacy Goals            Percentage of Plans with Lifestyle Goals            Percentage of Plans with All Goal Types</p>	<p><b>Plan Type</b>            X Axis - Age Ranges: Under 20; 21-30; 31-40; 41-50; 51-60; 61-70; over 70 / Y Axis - Number of Clients            Clients listed as with or without plans.</p> <p><b>Goal Distribution</b>            X Axis - Age Ranges: Under 20; 21-30; 31-40; 41-50; 51-60; 61-70; over 70 / Y Axis - Number of Clients            Clients listed as with or without goals.</p> <p><b>Goal Type Distribution</b>            X Axis - Age Ranges: Under 20; 21-30; 31-40; 41-50; 51-60; 61-70; over 70 / Y Axis - Percentage of Clients            All client goals divided up by type of goal (clients can fall into more than one category having multiple goal types).</p> <p><b>Plan Trends</b>            Number of tracking plans divided by total number of plans.            Number of tracking plan alerts that have not yet been triggered, divided by total number of tracking plans.            Total number of plans with allocations that will change in the next year.            Total annual retirement goal amounts divided by total number of retirement goals.            Sum of all starting ages across all retirement goals divided by the number of retirement goals.            Total annual lifestyle goal amounts divided by total number of lifestyle goals.            Total annual legacy goal amounts divided by total number of legacy goals.            Total annual education goals amounts divided by total number of education goals.            Total number of plans divided by the total number of client households.            Number of plans that have retirement goals divided by total number of plans.            Number of plans that have education goals divided by total number of plans.            Number of plans that have legacy goals divided by total number of plans.            Number of plans that have lifestyle goals divided by total number of plans.            Number of plans that have at least one of each goal divided by total number of plans.</p>



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<p><b>ALERTS</b></p> <p><b>Alerts Distribution</b> Number of Alerts Across Client AUM Range Number of Alerts Across Client AUM Range - Chart Statistics</p> <p><b>Alert Trends</b> Number of Alerts with Priority Critical Number of Alerts with Priority High Number of Alerts with Priority Medium Number of Alerts with Priority Low Number of Alerts with Status New Number of Alerts with Status in Progress Number of Alerts with Status On Hold Number of Alerts with Status Resolved Number of Clients with more than 1 Search Alert</p>	<p><b>Alerts Distribution</b> X Axis - AUM Ranges: Under 500k; 500k-1M; 1M-1.5M; 1.5M-2M; 2M-3M; over 3M / Y Axis - Number of Alerts Number of alerts broken down by client AUM and alert type distribution.</p> <p><b>Alert Trends</b> Total number of client alerts with the priority set to critical. Total number of client alerts with the priority set to high. Total number of client alerts with the priority set to medium. Total number of client alerts with the priority set to low. Total number of new client alerts. Total number of client alerts with in progress status. Total number of client alerts with a on hold status. Total number of resolved client alerts. Total number of clients with more than one search alert.</p>