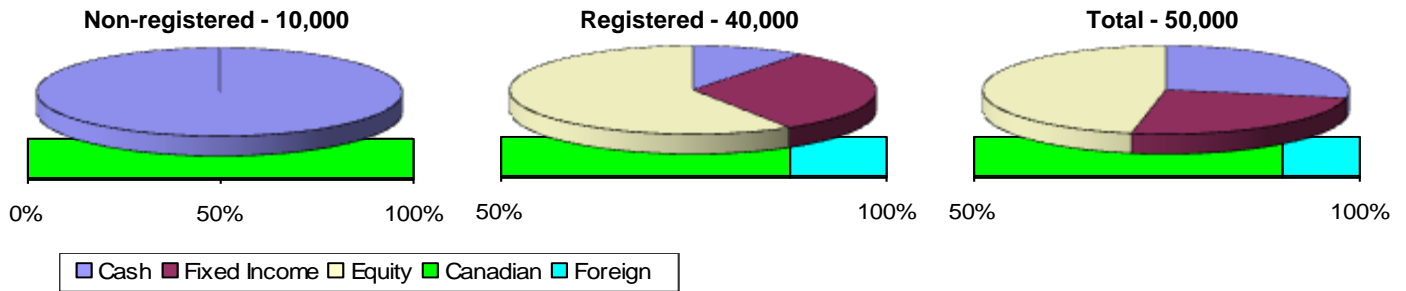


Investment Summary

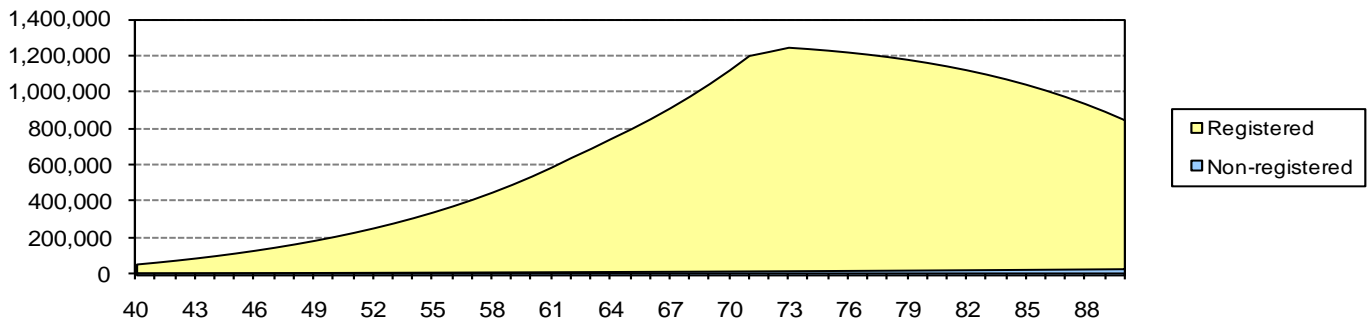
Prepared for Bill and Mary Smith

Investment Allocation



Diversification is an important element in any investment strategy, as it can help to reduce exposure to risk. It must be kept in mind however, that there are different kinds of risk. Market risk or volatility is not the only kind of risk. There is also the risk of declining interest rates as well as the potential for erosion of purchasing power due to inflation.

Investment Balance



The key to maximizing the growth of your investment portfolios is to strike the right balance between using tax efficient investments to your advantage and maintaining the right asset allocation relevant to your risk profile, accumulation requirements, and life cycle. The graphs offer an overview of how your position is likely to develop in the future based on your present investment strategy, including your current asset mix and plans for saving and investing.

Investment Deposits / Withdrawals

