Investment Classification

This User Guide details the classification of Investments on the Client Site.

To help you manage your wealth and monitor all of your accounts through a single, consolidated experience, there is a detailed list of account types included within the Investments view of your personal financial management website.

The investments (both in and out of estate assets) include the following account types:

- Taxable
- Qualified Retirement
- Roth IRA
- HSA
- 529
- Annuities
- Deferred Compensation
- Cash
- Stock Options
- Life Insurance Cash Values

Investments in the Accounts section are broken out into Taxable and Tax Advantaged accounts.