

ALEX BOAL CUST FOR
GRIFFIN BOAL
UNDER CA/UTMA UNTIL AGE 18
4 VOUCHER RD
BINGHAM, MA 02043-3623

Portfolio Summary

Total Portfolio Value

\$1,413,513.55

1 Month Ago	\$1,435,095.98
1 Year Ago	\$1,497,071.37
3 Years Ago	\$43,067.56
5 Years Ago	\$9,448.85

Important tax form information

As of Feb. 15, Edward Jones has furnished all required 2021 Consolidated 1099 Tax Statements to clients. If you received a Figures Not Final tax statement, that means we did not receive final tax information for at least one of your securities by Feb. 15. Security issuers may file extensions or have a March 15 deadline to provide information to brokers. Once we receive final information for your securities, we will furnish you a final tax form. Visit edwardjones.com/taxcenter to learn more.

When was your last review?

Like most Americans, you've probably had to adapt to change in the past year or two. Should your investing strategies change, too? If you haven't had a review with your financial advisor in the past 12 months, now is the time to do so. Together, you can discuss changes in - and outside - your life and determine if any adjustments are needed. Even if no action is necessary, a check-in can ensure your finances are still on track toward your goals.

Overview of Accounts

Accounts	Account Holder	Account Number	Value 1 Year Ago	Current Value
Joint Tenants With Right of Survivorship Select	Alex Boal & Kristin Sullivan Boal	146-28267-1-8	\$1,065,399.96	\$649,240.00
529 College Savings Plan Select	Alex Boal	146-28321-1-2	\$94,743.37	\$111,191.83
529 College Savings Plan Select	Alex Boal	146-28322-1-1	\$94,743.37	\$121,869.19
529 College Savings Plan Select	Alex Boal	146-28333-1-8	\$94,743.37	\$110,460.49
Roth Individual Retirement Account Select	Alex Boal	146-85368-1-6	\$27,757.51	\$35,492.71