



October 27, 2016

JOHN SMITH
123 MAIN STREET
ANYTOWN, MA 01234

Advisor(s):
John Advisor
123-456-7890

Commonwealth Account Profile: Revised Account

We are sending you this letter in order to confirm the accuracy of the update(s) we recently received for your Commonwealth IRA account (see the "**Account Profile Changes**" section found at the end of this Revised Account Profile).

Please take a few moments to review this information carefully. If anything is incorrect, please contact us as soon as possible. You may fax your corrections to us at 866-316-8357 or mail your corrections to us: Commonwealth Financial Network, 29 Sawyer Road, Waltham, MA 02453. If all the information is correct, no further action is required on your part.

Please note: A change to any of the information listed below will result in a confirmation letter (i.e., Revised Account Profile) being sent to you. For your protection, if we change the account's address, we will mail the confirmation letter to BOTH old and new addresses.

Client Information

Account Owner:	John Smith	Legal Address:	123 Main Street Anytown, MA 01234
Phone 1:	555-712-6432		
Phone 2:	555-464-4284	Mailing Address:	123 Main Street Anytown, MA 01234
Occupation:	Mechanic		

Financial Information and Investment Knowledge

Annual Income:	\$500K+	Annual Expenses:	\$100K-\$250K
Estimated Net Worth:	\$1M-\$5M	Special Expenses:	\$0-50K
Investable/Liquid Assets:	\$500K-\$1M	Special Expenses Time Frame:	0-2 Years
		Investment Knowledge:	Good

Account Details

Account Mailing Address:	123 Main Street Anytown, MA 01234	Investment Objective*:	Growth
Manager:	PPS Select	Time Horizon:	Long (over 10 years)
Strategy:	Passive Balanced Equity	Discretion:	PPS Select / Commonwealth

**Investment objectives and their definitions are provided on the back of this document.*

Account Profile Changes

The information below shows which portion(s) of your account profile has been updated.

Field Changed:	From:	To:
Client Legal Address	10 Central Street, Anytown, MA 02341	123 Main Street, Anytown, MA 01234
Discretion	John Advisor	PPS Select / Commonwealth
Investment Objective	Growth	Primarily Growth

DRAFT