



FUGENT

[WWW.FUGENT.COM](http://WWW.FUGENT.COM)

---



### Meeting Details

**Host:** Jake Hoyt  
**Date:** 1/6/16  
**Time:** 4:30pm – 5pm  
**Location:** Online  
[ADD TO YOUR CALENDAR](#)

If you have any questions about this meeting please contact:

Jake Hoyt  
jhoyt@providence.com  
614.555.5555

For Fugent technical support please call 888.866.6547

Please join me for

## January 6<sup>th</sup> Market Discussion

Dear John Smith,

I know many of you may be concerned with the developments today in the US and Chinese stock markets. We would like to help you take the emotion out of the situation, allowing you to think rationally about what is going on. If you are available please join me for a quick web meeting to discuss today's events.

Registration is required to attend this meeting. Please follow the link below to register .

[Register Now >](#)

Quick Start

Meeting Info

+ New Whiteboard



Participants



Chat



Recorder



Notes

## Account Overview

Current Portfolio Value

\$994.93

Return Since Inception

6.41%

Current Risk Score

8.8

+ Add Auto-Deposit

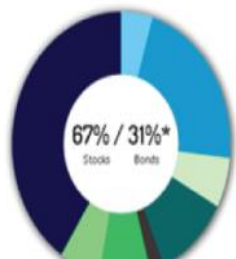
+ Add or Withdraw Funds

 Invite a Friend  
 5 invites remaining

## Performance

 Show Total

## Portfolio Overview



Investment	Ticker	Percent
US Equities	VTI	40.8%
International Developed Equities	VEA	22.0%
US Corporate Investment Grade Bonds	LQD	10.8%
US Treasuries	VGIT	7.5%
US Inflation Protected Bonds	TIP	6.0%
REITs	VNQ	6.1%
International Emerging Equities	VWO	4.7%
Cash	USD	2.0%
Overall Investment Portfolio	--	100.0%

\*Percentages do not include cash.

Participants



Louis Cha (audio only)

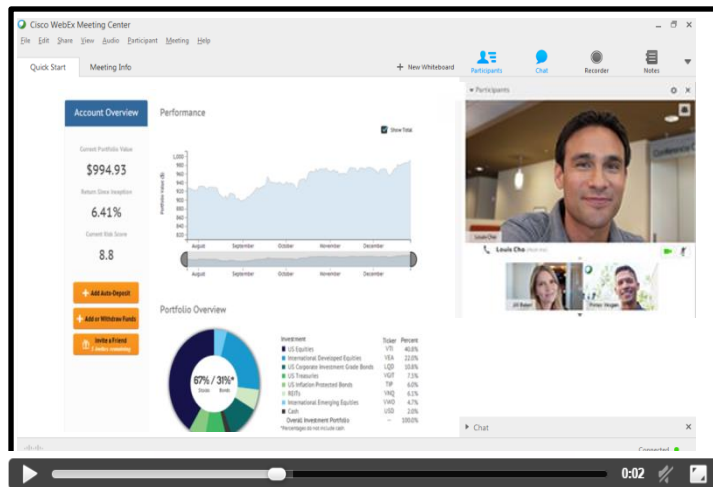


Jill Baker

Prince Shapiro

▶ Chat

Connected ●



## Our Resources

### Download Name

### Description



January 6th Market Discussion

We invite you to watch our short webinar where we discuss the development in the US and Chinese stock markets.



Volatility: The fact of life

While volatility is a fact of life, these are strategies that can help lessen the impact of



Please join me for

## Estate Planning

Dear John, Maggie, and Bill,

I'm so sorry to hear of the passing of your mother. She was not only a client but also a friend.

As you know your mother and I worked very closely on planning her estate. I think it's important we all get together to review the provisions of her estate. I know that you are all in remote locations, so I've arranged a virtual meeting where we can all review the details with out any travel.

Use the button below to add this meeting to your calendar

[Add to Calendar >](#)

### Meeting Details

**Host:** Michael Vierra

**Date:** 5/8/16

**Time:** 1pm – 2pm

**Location:** Online

ADD TO YOUR CALENDAR

If you have any questions about this meeting please contact:

Michael Vierra  
Mvierra@providence.com  
614.555.5555

For Fugent technical support please call  
888.866.6547



## MICHAEL VIERRA

Business Acquisition Manager

Hey Bob,

Thanks for setting up the meeting between your clients and myself. I thought some of your clients would like to see my microsite to learn more about the services we can offer.

[Visit Site >](#)

**Regards**

Michael Vierra



Email: [michael.vierra@providence.com](mailto:michael.vierra@providence.com)

Phone: 614.555.5555

## Meet The Team

Our team of financial professionals are committed to their clients, each other and to their profession. They take pride in the level of integrity, their depth of knowledge and the quality of service.



**Michael Vierra**  
Regional Vice President

**Email:**  
mvierra@providence.com

**Office:**  
877-346-8378 x 854506

Michael Vierra joined Providence in 2010 and after four years as head of national accounts, he was promoted...

[Learn More about Michael >](#)



**Jason Miller**  
Retirement Plan Sales Associate

**Email:**  
jmillier@providence.com

**Office:**  
877-346-8378 x 124356

Jason Miller joined Providence in 2005. From 1999 to 2005, Jason worked as head of sales and regional director...

[Learn More about Jason >](#)



**Myla Sorensen**  
Internal Wholesaler

**Email:**  
msorensen@providence.com

**Office:**  
877-346-8378 x 554506

Myla Sorensen joined Providence in 2014 as an Internal Wholesaler. From 2009 to 2014 she was employed as...

[Learn More about Myla >](#)



**Ryan Williams**  
Retirement Plan Sales Associate

**Email:**  
rwilliams@providence.com

**Office:**  
877-346-8378 x 345723

Ryan Williams joined Providence in 2002. From 2011 to 2012 Ryan was a regional sales associate at IndexIQ...

[Learn More about Ryan >](#)

## Download Whitepapers



### Explaining Alternative Strategies to "Conventional" Customers

Alternative investments are the entire buzz but they can often confuse a "conventional" client. Here is our guide to explaining alternative investments.

[Download >](#)



### Volatility. It's a fact of life

While volatility is a fact of life, there are strategies that can help lessen the impact of volatility on the client's portfolio. Learn our tips.

[Download >](#)



### In Search of Alpha

The past three years have not been straightforward for investing. Less than 20 per cent of wealth managers' portfolios have added positive alpha. Learn how we can help.

[Download >](#)



T3.FUGENT.COM