

Account overview

Balance details 

as of 7/5/23

Total balance	\$56,905.09
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Fund balance	\$50,905.09
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Outstanding loan balance	\$6,000.00
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Self-directed option	\$5,146.12
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Home loan (8/2021)	\$18,500.00
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Personal loan (3/2023)	\$7,950.00
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Rate of return 

1/1/2023 – 7/5/2023

 **6.93%**

YTD

1 Year

Max



Accounts



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