

## Davenport Online – Modern Theme

### What is the Modern Theme?

The Modern Theme is the new display for Davenport Online. Modern Theme provides a simpler, interactive digital experience.

### Navigation Information

Additional navigation information for the Modern Theme is below.

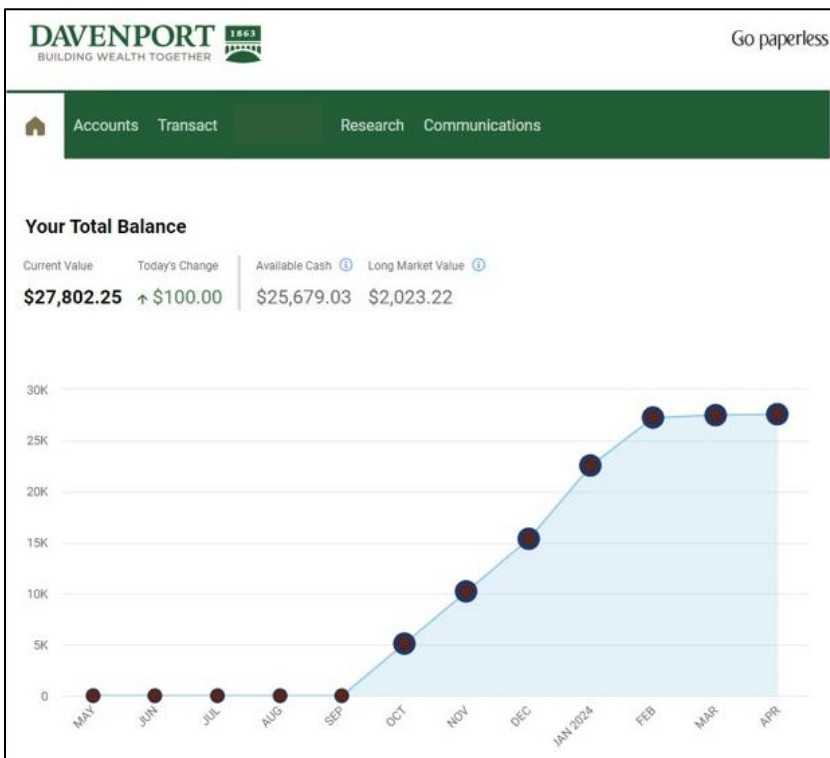
### Account Overview

The account overview on the home page is located on the right side of the screen and will show all the accounts you have access to in a list view. Click on the blue account nickname to access more information such as balances, history, and holdings.

Investments	Market Value
IRA	\$0.00
x0000	\$0.00 0%
<a href="#">View Account Balances</a>	

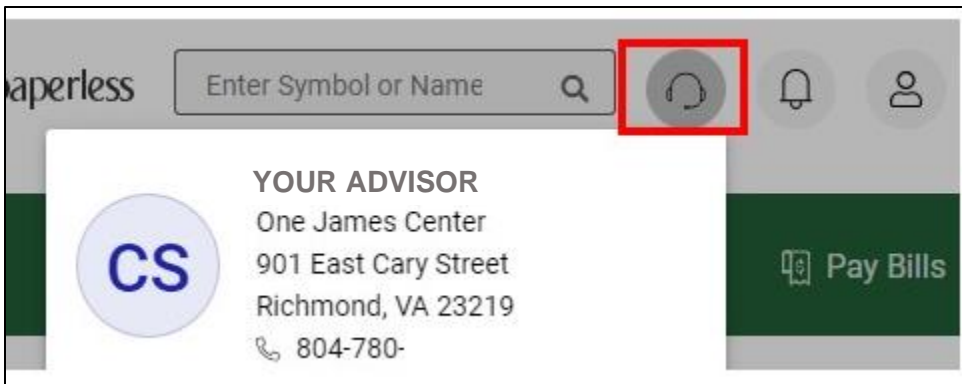
### New Home Page

The new home page now contains a valuation over time graph for the last 12 months. You can easily view your current account value(s), available cash, and today's change.



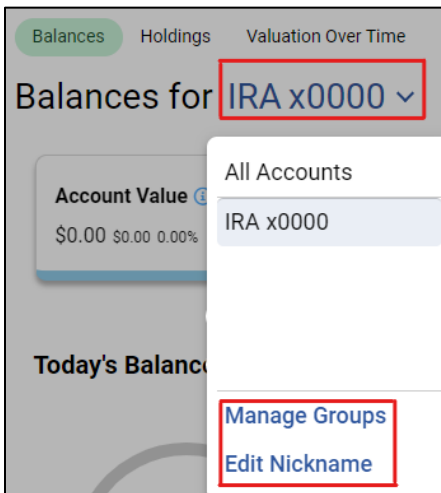
### Advisor Contact Information

Your advisor's contact information is available in the top right corner under the headset icon.



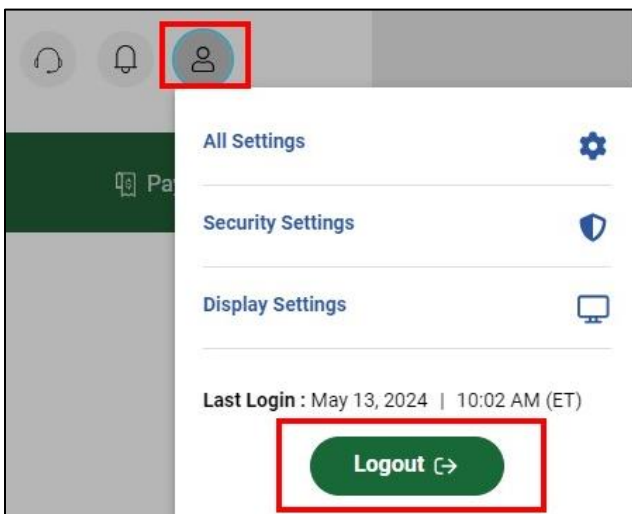
### Creating Account Groups or Nicknames

If you'd like to update your account nickname or create a group, click the individual account drop down. To create a group, select *Manage Groups*. To edit an account nickname, select *Edit Nickname*.



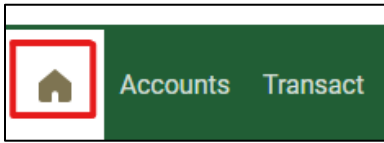
### Logout Button

The log out button can be found under the person icon in the top right corner.



### Home Button

The navigation bar within Modern Theme has a home button which will return you to the main landing/overview page that displays upon first logging in to your account.



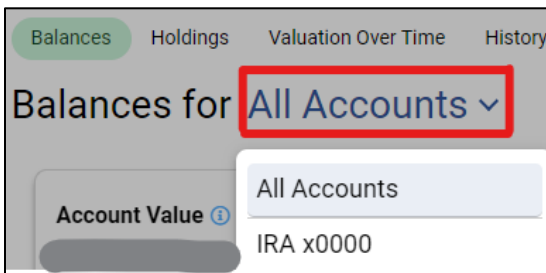
### Accounts Tab

To view account balances, holdings, and history, click on the *Accounts* button on the navigation bar.



### Switching Between Accounts

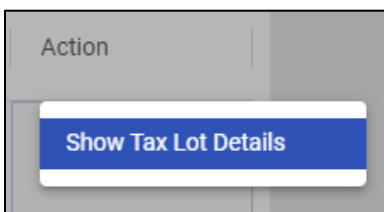
If you would like to view a specific account, you can do so by clicking the *All Accounts* drop down button which will allow you to toggle between accounts.



### Tax Lot Details

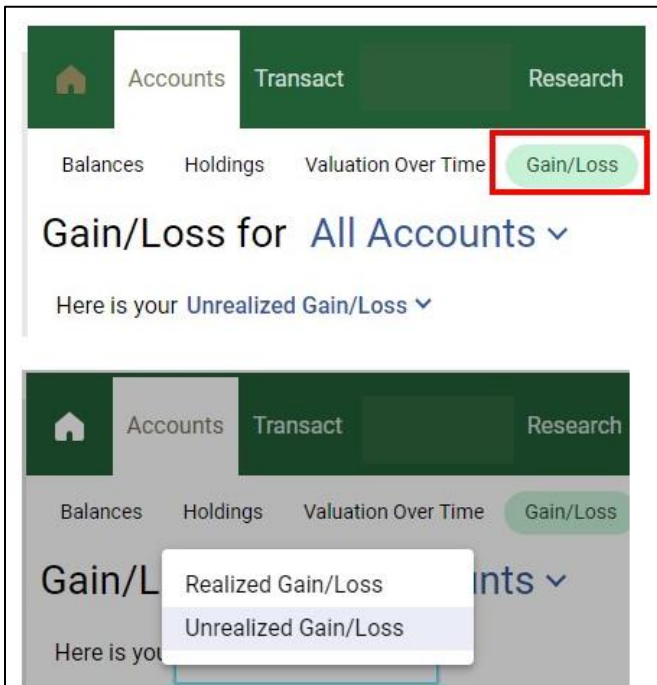
To view information regarding your tax lots on the gain/loss screen, you can select action > show tax lot details.

Security ↑	Quantity	Last Price	Total Cost <sup>2</sup>	Market Value	Gain/Loss	Account Number	Action
	200.00	\$186.76					Action ▾



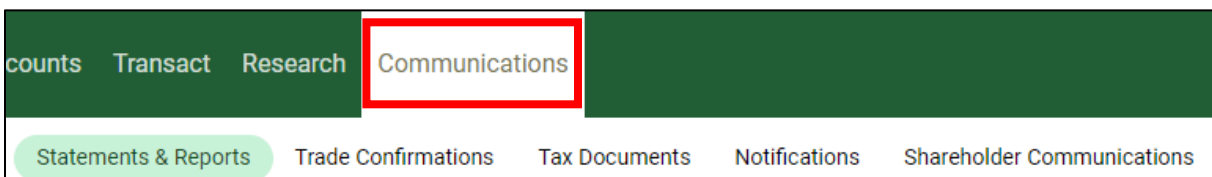
### Gain/Loss Tab

Unrealized and Realized Gain/Loss is now consolidated into one tab. You can filter between the two once you are on the gain/loss screen.



### Communications Tab

Your statements, trade confirmations, tax documents, and other notifications can be found under the communications tab.



### Support

Davenport Online Support is available Monday through Thursday, 8:45 a.m. to 5:00 p.m. EST and Friday, 8:45 a.m. to 4:15 p.m. EST. We may be reached by email at [support@investdavenport.com](mailto:support@investdavenport.com). You may also reach us by telephone at (804) 697-2997 or toll free at 1 (888) 742-1863.

**Important Note to Recipients:** *The information presented herein was compiled from sources believed to be reliable. It is intended for illustrative purposes only and is furnished without guarantee of its completeness or accuracy.*

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