Household Account Summary **Family of [Broker.name]**

**Market Value As of [InputParameter.endDate]**

**For Service Contact:**

**[Organisation.name]**

**[Organisation.address]**

**[Broker.name]**

**[Portfolio.address]**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Investor/Account | Account Number | Custodian | Market Value | |
| [GroupedBrokerName] |  |  |  | |
| [GroupedPortfolioName] | [Portfolio.brokerAccountNumber] | [Portfolio.custodian] | [PortfolioMV] | |
| Total Value | | | | **[TotalMarketValue]** |