




**Investments -
Creating, Changing and Merging**

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Investment Definition

- Investment Description
- Ticker Symbol
- CUSIP
- Cash Investment
- Not a qualifying plan asset
- Unique to this plan




Groups

- Creating groups




Plan Investments

- Adding Investments to your plan
- Default election percent
- [Receivable] check-box
- [Cash?] check-box
- Share decimal places
- Valuation price
- Election percents



Merge Investments

- Cash
- Shares
- Loans



Share Price

- Price history
- Split History
- Dividends
