



Market Street Advisors' Download Center is a fast, convenient way to access your data and gain insight into your accounts. A key aspect of this feature is the ability for the reports to be delivered as spreadsheets or other preformatted data.

In most cases, after choosing a report and any subsequent selection filters, simply click on the "Submit" button and the report is automatically downloaded as a ".xls" file. Providing a spreadsheet gives you the power to quickly sort and filter the data, further refining your research. This also allows you to easily copy and paste information into other programs or spreadsheets. The Download Center also provides some reports in text formats to speed the process of uploading data to other programs you may already be using.

The Download Center currently has a wide array of reports available in a number of categories, including:

- Accounts**
  - › View active accounts and profile fields
  - › Track changes
- Assets**
  - › Access cash and asset reports for multiple or single issues
  - › Easily view historical asset detail
- Billing**
  - › Review your firm's billing profiles
  - › Access consolidated billing details
- Compliance**
  - › Quickly review restrictions and outlier holdings by account
- Trade Orders**
  - › Easily export files from pre formatted reports
- Performance**
  - › Review performance summaries or detailed histories
  - › Quickly extract performance for account groups
- Positions**
  - › Download a pre-formatted 13F report
  - › Easily cross reference securities and find missing tax lots
- Transactions**
  - › Extract trade data for account groups