



How to read your new statement

Our recent conversion to a new, state-of-the-art system is one of the many ways for **Washington Trust Wealth Management** to demonstrate its commitment to providing you with the best possible service. Along with the first-class service you'll receive from a team of Wealth Management professionals, you will also receive **new, improved account statements**. To familiarize yourself with the new layout, please take a moment to review this Guide. We hope you find the new statement to be comprehensive, informative, and easy-to-read. As always, if you have any questions, **please contact us at 800-582-1076**.

Account Statement
April 1, 2018 - April 15, 2018

George Washington IRA Dated 12/21/2017

WASHINGTON TRUST
Wealth Management®
23 Broad Street, Westerly, RI 02891
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1 Your team is here to help
Wealth Management Officer: 401 348 1200 XXXXXX@washtrust.com
Portfolio Manager: 401 348 1200 XXXXXX@washtrust.com

2 Accounts included in this statement
123456789 George Washington IRA Dated 12/21/2017

1 Easily identify or contact your **Wealth Management Team**.

2 **Summary of accounts**, will include all of your accounts if the statement is consolidated.

3 **Table of Contents**

4 **Information** pages at the end of your statement include important terms and definitions associated with your account.

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4 Information

DISCLOSURES

Account Safety
Please review your statement carefully and report any discrepancies promptly to your Wealth Management Client Services Representative at the number provided on your statement. It is recommended that you confirm any oral communications in writing by sending Washington Trust Wealth Management (hereinafter referred to as "WTWM") a letter within ten (10) days of receipt of your statement.

Account Information
Please contact your Wealth Management Client Service Representative if you have any changes in your financial situation, contact information or investment objectives or if you wish to impose any reasonable restrictions on the management of your account(s) or modify any existing restrictions.

Account Valuation
Security prices and income projections shown have been obtained from sources believed to be reliable. However, we cannot guarantee their accuracy or that securities can be bought or sold at these prices.

Unsupervised Assets
This report provides a total account view and may include unsupervised assets which are taken into account for both market value and performance.

Fees and Charges
The "Fees and Charges" amount shown on your statement includes all activity fees consistent with your fee agreement.

Fair Market Value for Individual Retirement Accounts
Your fair market value as of December 31st will be reported to the IRS as required by law.

Withholding on Distribution or Withdrawals
Federal tax law requires WTWM to withhold income tax on distribution(s) from your taxable retirement accounts by electing a percentage or fixed amount to be withheld from your distribution unless you elect not to have income taxes withheld. If you do not have enough income tax withheld from your distributions, you may be responsible for the payment of estimated tax. You may incur penalties if the amounts withheld and your estimated tax payments are not equal to your tax obligation. State withholding, if applicable, is subject to the state's withholding requirements.

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Overview of your account - 123456789 George Washington

Investment objective: Income and Growth

5 Activity summary

	This period (\$)
Beginning market value	180,060.25
Cash and security transfers	0.00
Contributions	0.00
Income & Capital Gain Distributions	170.57
Fees	0.00
Withdrawals	-12,015.00
Change in account value	-216.71
Market value on Apr 15, 2018	\$167,999.11

6 Income earned

	This period (\$)
Taxable income	170.57
Tax-exempt income	0.00
Tax-deferred income	0.00
Total income earned	\$170.57
Total short term realized capital gain/loss	\$0.00
Total long term realized capital gain/loss	-\$52.50
Total realized capital gain/loss	-\$52.50

This summary is for your reference. It is not intended for tax-reporting purposes. Taxable income is taxable at the federal level and may be taxable at the state level.

Asset Allocation on April 15, 2018

	Market value (\$)	Percent
Cash	10,313.78	6%
Equities	98,826.88	59%
Fixed Income	58,858.45	35%
Total of your account	\$167,999.11	100%

5 Clearly stated **Investment Objective**.

6 **Income Summary** to help review dividend and interest activity.

7 Easy-to-read **Asset Allocation** pie chart and summary.

8 **Bond Maturity & Bond Quality Ratings** are also included in full-color pie charts.

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Portfolio Analysis - 123456789 George Washington

8 Bond maturity

	Market value (\$)	Percent
Less than Five years	58,858.45	86%
Uncategorized	9,487.50	14%
Total of your portfolio	\$68,345.95	100%

Bond quality ratings

	Market value (\$)	Percent
Aaa	24,529.00	35%
A	19,990.00	29%
Baa	14,739.45	22%
Not Currently Rated by	9,487.50	14%
Total of your portfolio	\$68,345.95	100%

Fixed income sector analysis

	Market value (\$)	Percent
High Yield MF-ETF	9,487.50	14%
Corporate	58,858.45	86%
Total of your portfolio	\$68,345.95	100%

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Your portfolio holdings on April 15, 2018

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	Number of Shares / Face Value	Price	Market value	Cost basis	Unrealized gain or loss	Est. ann. inc. / yield at market	% of account
12345678 Georg Washington IRA Dated 12/21/2017							
Cash							
<i>Cash and Equivalents</i>							
Fidelity Investments Money Market Funds - Government Portfolio CUSIP: 1234566	1,911.90	1.00	1,911.90	1,911.90	0.00	18.84 0.99%	0.72%
Total Cash and Equivalents			\$1,911.90	\$1,911.90	\$0.00	\$18.84 0.99%	0.72%
Total Cash			\$1,911.90	\$1,911.90	\$0.00	\$18.84 0.99%	0.72%
Equities							
<i>Domestic Equity Funds</i>							
iShares Russell 1000 ETF CUSIP: 12345666	633.00	147.70	93,494.10	95,183.64	-1,689.54	1,585.66 1.70%	35.08%
iShares Russell 2000 ETF CUSIP: 1234545666	114.00	153.95	17,550.30	17,575.21	-24.91	216.49 1.23%	6.59%
iShares Russell Mid-Cap ETF CUSIP: 1243454586	151.00	206.10	31,121.10	31,773.40	-652.30	487.73 1.57%	11.68%
Total Domestic Equity Funds			\$142,165.50	\$144,532.25	-\$2,366.75	\$2,289.88 1.61%	53.35%
<i>International Equity Funds</i>							
iShares Core MSCI Emerging Markets ETF CUSIP: 1234566576	180.00	57.66	10,378.80	10,524.33	-145.53	240.12 2.31%	3.90%
iShares MSCI EAFE ETF CUSIP: 1423645376	297.00	70.79	21,024.63	21,113.31	-88.68	535.79 2.55%	7.89%
Total International Equity Funds			\$31,403.43	\$31,637.64	-\$234.21	\$775.91 2.47%	11.79%
Total Equities			\$173,568.93	\$176,169.89	-\$2,600.96	\$3,065.79 1.77%	65.14%

9 Enhanced **Description** fields for easier readability of data, including **Percent of Total Assets**, and alphabetical list of assets grouped by category.



Access your statement online at www.washtrustwealth.com. Contact your account administrator to learn more.