

BILLING GROUPS DETAIL

Cornerstone Revolutions
 Phone: 831.477.7047

Name	Description	Billing Method	Client Name	Account #	Account Type	Account Description
Doe Billing Group	Doe Billing Group	Tiered AUM	Doe, John & Jane	456789123A	Roth IRA	Jean's ROTH
			Doe, John & Jane	987654321N	JTWROS	JTROS
			Doe, John & Jane	987654321R	Rollover IRA	Bob's IRA
Kehoe Family	Kehoe Family	Tiered AUM	Apple Financial Trust	951753654C	Trust	D.Morgan FBO
			Apple Financial Trust	954135474G	Trust	D.Morgan FBO
			Bass, John	123456789G	Rollover IRA	IRA Rollover
			Bass, John	123456789H	Rollover IRA	IRA#2