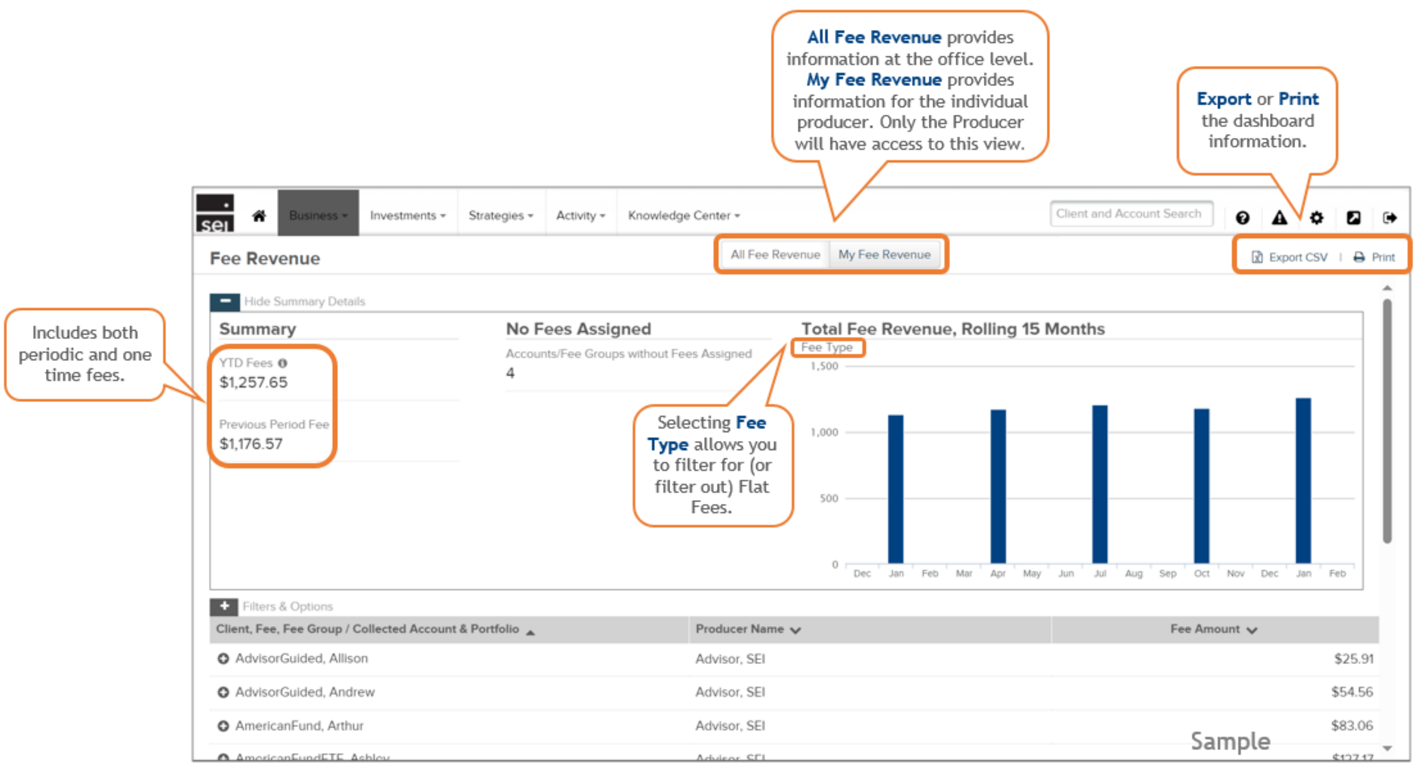
Fee Revenue Dashboard.

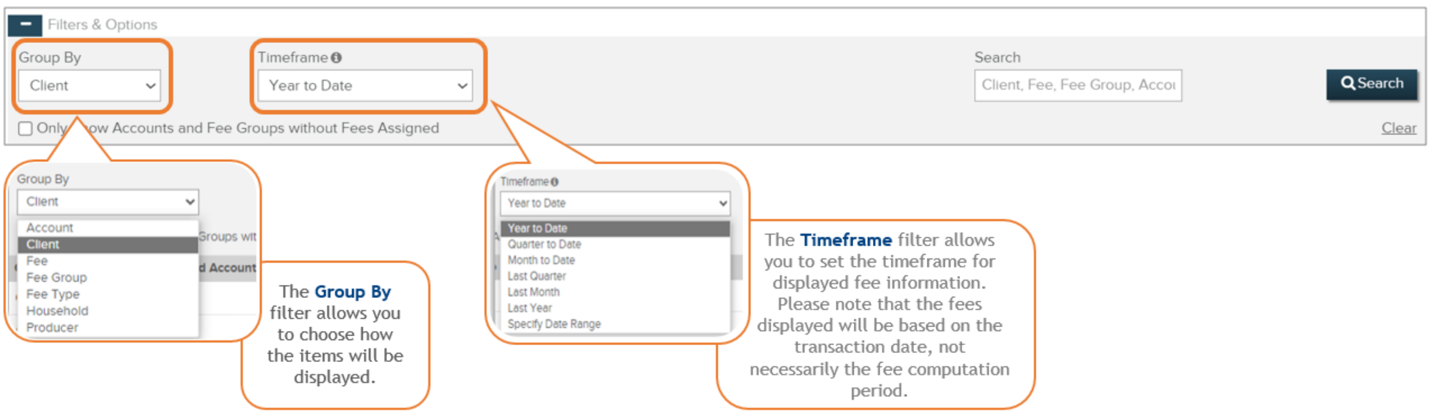
Overview

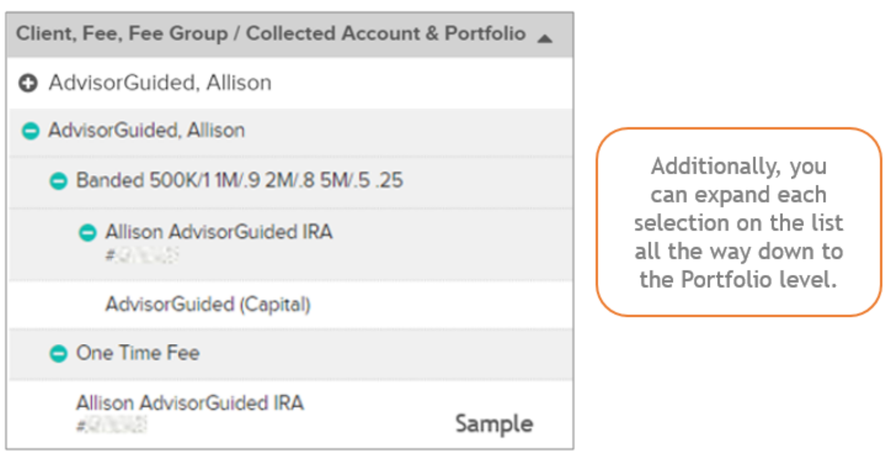
The **Fee Revenue Dashboard** provides year-to-date Advisory Fee summary information, Previous Period Fee information, the number of accounts with No Fees Assigned, a Rolling 15 Month graph, and a filterable list of Advisory Fees taken.

The dashboard can be accessed through the **Business** tab in **Advisor Center**.



The lower half of the dashboard will display a list of clients, fee groups, accounts, and portfolios and the fees charged to them. This list will default to displaying items **grouped by client**, and will only include clients who have incurred fees **year to date**. This list can be filtered and sorted in the **Filters & Options** section.





For more detailed information on fees, please see the information for the Periodic Fee Computation and Periodic Fee Profile reports on page three of the Standard Reports Guide.