Adding Accounts or Assets Outside Northern Trust

You can track accounts at other financial institutions or service providers within Private Passport, creating one convenient and secure site to view your comprehensive financial picture and net worth.

TYPES OF ACCOUNTS OR ASSETS YOU CAN ADD TO PRIVATE PASSPORT

- Accounts from most banking and credit card providers
- Mortgages and loans
- Investments
- Online rewards programs like airline miles
- Real estate
- Jewelry, fine art, wine collections and more

HOW TO ADD NON-NORTHERN TRUST ACCOUNTS ELECTRONICALLY

Please note you must already have online access for the account at the other financial institution or service provider in order for Private Passport to access the account. Make sure to verify your ID and password before adding the account.

1. Click on the **Add Account** button, which is located in various places throughout Private Passport including on the bottom of the **Net Worth Summary** view, the **Manage Accounts & Consolidations** page or the **Shortcuts** drop-down.
2. From the **Add an Account** page, select **Search Online Institutions List** from the **Electronically Add Non-Northern Trust Account** section.
3. The **Search for Provider** page will appear where you can search by category or enter the name of your institution or provider or use the alphabetical index to further refine search results.
4. Once you have selected a provider you will be asked to enter your **ID** and **Password** as you would at that provider's Web site.
5. **Verify Password** by typing it a second time. (Depending on the provider, you may be asked additional security questions.)
6. Click **Continue.** Private Passport then retrieves your account information and displays account(s) associated with the ID you entered.

You only have to enter this information once. Private Passport will automatically access your account information from the financial institution or provider on a nightly basis. When the provider is successfully added, your account balances and transaction history will display in the **Net Worth Summary** and throughout Private Passport – giving you a more complete view of your financial picture.

Additionally, you can set up custom alerts to receive notifications for activity and balance information on added accounts enrolled in Bill Payment from your computer.

HOW TO ADD NON-NORTHERN TRUST ACCOUNTS MANUALLY

You can also use Private Passport to keep track of assets at other financial institutions that are not online, or keep track of alternative investments, portfolio accounts or non-financial assets such as fine art collections, jewelry and real estate, providing for a more complete picture of your total net worth. You do this by manually entering a description, value and other optional information.

1. Click on the **Add Account** button that is located in various places throughout Private Passport including on the bottom of the **Net Worth Summary** view, the **Manage Accounts & Consolidations** page or the **Shortcuts** drop-down.
2. From the **Add an Account** page, select **Create Account** from the **Manually Add Non-Northern Trust Account** section.
3. Enter the account information and follow the prompts Your non-Northern Trust accounts will be available for reporting purposes.

Need Help?

If you have any questions or would like more information, call the Private Passport Help Center at 1-888-635-5350. Outside the U.S., call 1-312-557-5900.