



Personalizing Your Online Experience

Through **My Profile & Preferences**, **Manage Accounts & Consolidations** and **Alerts & Message Center**, you have the power to personalize Private Passport to best meet your needs and establish how you prefer to monitor and manage your accounts.

MY PROFILE AND PREFERENCES

My Profile & Preferences is found under the **My Passport** section. **My Profile & Preferences** will also let you customize and update other aspects of your Private Passport experience such as:

- Login ID
- Default start page
- Preferred asset identifier
- Time zone
- Number format
- Date and time formats
- Contact information
- Account display format
- Default reporting preferences

From **My Profile & Preferences** select what you would like to edit and then click **Save Changes**.

The **My Passport Summary** page is the default start page. If you want to start at another page, select **Default Start Page** from within **My Profile & Preferences**, select the name of the page from the dropdown list and click **Save Change**. Additionally you can click **Make this My Start Page** from the footer of any page in Private Passport.

MANAGE ACCOUNTS & CONSOLIDATIONS (GROUPS OF ACCOUNTS)

Manage Accounts & Consolidations is found under **My Passport** and lets you view and edit information about your accounts and allows you to create groups of accounts.

Accounts

The **Accounts** tab enables you to:

- View and edit account details, including assigning nicknames.
- Manage valuations within a non-Northern Trust account.
- Delete outside accounts.
- Add accounts held outside Northern Trust.

Consolidations

A consolidation is a group of accounts that you can use to see information for multiple accounts at the same time. You can create any number of custom consolidations. A consolidation can be made up of both Northern Trust and non-Northern Trust accounts. Once you have created a consolidation, you can use it for tracking the net worth of the underlying accounts, monitoring asset allocation using alerts and holdings views, as well as keeping track of all your transactions with one consolidated activity view.

HOW TO CREATE A CONSOLIDATION

1. From **Manage Accounts & Consolidations**, select the **Consolidations** tab.
2. Click on **Create New Consolidation**.
3. Provide a title for your consolidation.
4. Select the accounts you wish to add to the consolidation and click **Save**.

The **Consolidations** tab enables you to:

- Create consolidations.
- Add accounts to consolidations.
- View consolidation details.
- Edit custom consolidations.
- Delete consolidations.

CHANGES IN REAL TIME

The changes you make within **My Profile & Preferences** and **Manage Accounts & Consolidations** are reflected immediately. That means as soon as you visit another page, you will see the changes reflected on that page's information.



ALERTS & MESSAGE CENTER

To stay one step ahead by receiving timely e-mail alerts delivered to your smartphone, tablet or computer, simply provide Private Passport with your e-mail address. Whether you are interested in keeping as up-to-date as possible on your account balances, asset allocations or specific transaction activity, Private Passport will let you know.

HOW TO ADD AN E-MAIL ADDRESS

1. Under the **My Passport** section, select **Alerts & Message Center**.
2. Click the **Create Alerts** button.
3. Click on the blue link **Add New Email Address**.
4. Type in your e-mail address and click **Add**, you have the option to have your email address added to all existing or future alerts.

CUSTOMIZING PAGES

All summary pages within Private Passport are customizable. You can create your own personal dashboard of account information and market-related content to display what is most meaningful to you.

HOW TO ADD CONTENT

1. Click on the **Add** Content button.
2. Select the item(s) you would like to add by clicking **Add**.
3. Click **Finish**.

Once you have added the information you find most interesting, you can organize the layout of your page by dragging and dropping content to your desired location within the page.

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 United States, call 1-312-557-5900.