Locate the A

Investor360°

Beginning Balance

Ending Balance:

Balances

Additional Assets

One Advisor Manually Enter

ASSETS \$794,291.66

USAA - Expenses & Em

Real Estate/Property

LIABILITIES \$-299.98 Credit Cards

TOTAL NET WORTH

Locate the **Additional Assets** section on the **Portfolio > Overview > Balances** tab.

0.00

41,250.00

-250.00 -49.98 Additional Assets

ASSETS \$794,291.66

USAA - Checking V

Real Estate/Property

LIABILITIES \$-299.98

Credit Cards

TOTAL:

USAA - USAA Savings V

Banking

Madvisor Manually Entered Account

USAA - Expenses & Emergency V

American Express Credit Card V

USAA - Platinum Visa V

TOTAL NET WORTH:

John & Jane Smith - Joint w/Survivor NFS ✓

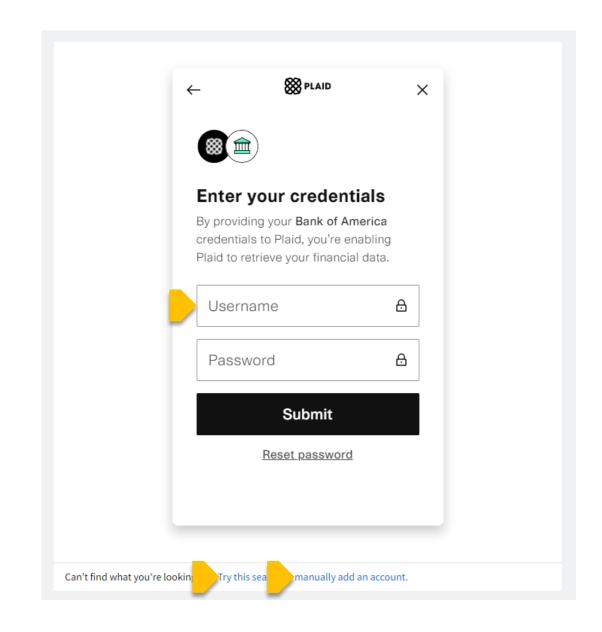
2 Select Add Account.

To automatically connect your account, select your financial institution from the list, then enter your credentials.

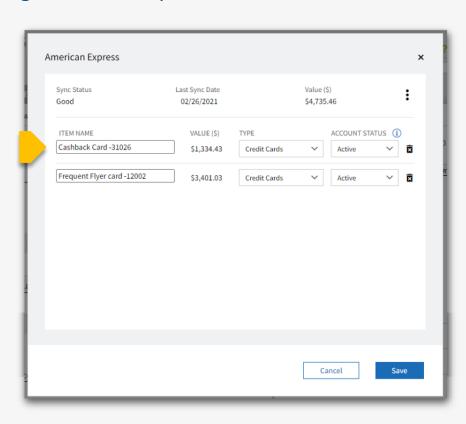
Due to enhanced security requirements, some financial institutions may require you to enter the credentials a second time.

If you don't find what you're looking for, select **Try this search**.

To manually add your account without connecting to a bank, select Manually enter account information.



After connecting, edit the account's name to give it a descriptive title, then select **Save**.



If manually adding an account, select the **Account Type**, enter details, and select **Save**.

+Add Account

41,250.00

20,211.59

4,344.07

31,024.00

697,462.00

-250.00

-49.98

\$793,991.68

\$818,875.72

Show Inactive Accounts

AS OF DATE LATEST VALUE (\$)

05/25/2021

05/28/2021

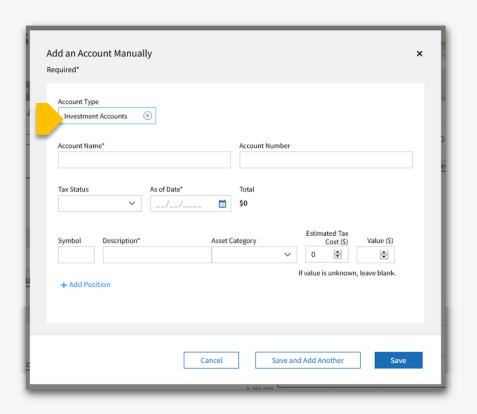
05/28/2021

05/25/2021

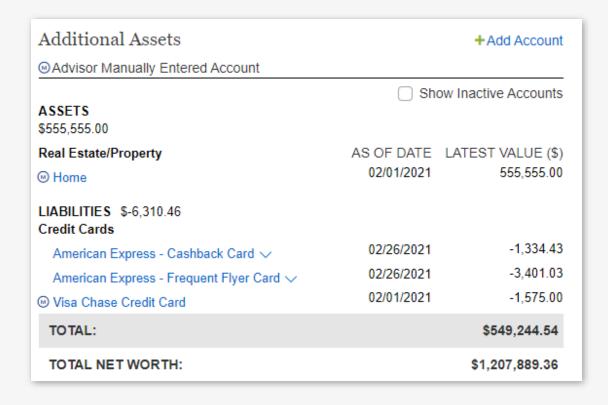
06/01/2017

05/27/2021

05/28/2021



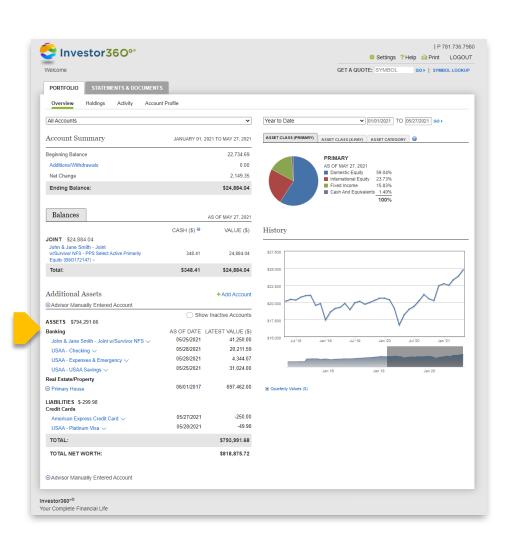
The external accounts are shown in the **Additional Assets** section and the **Holdings** subtab.



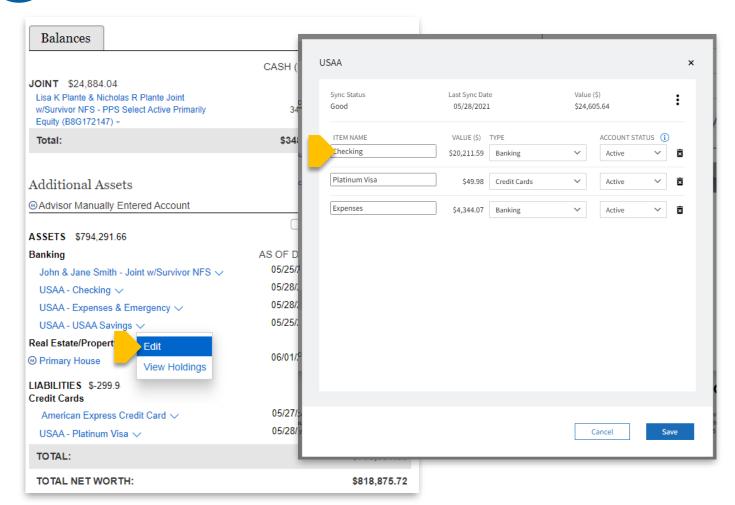
Edit Account/View Holdings

1

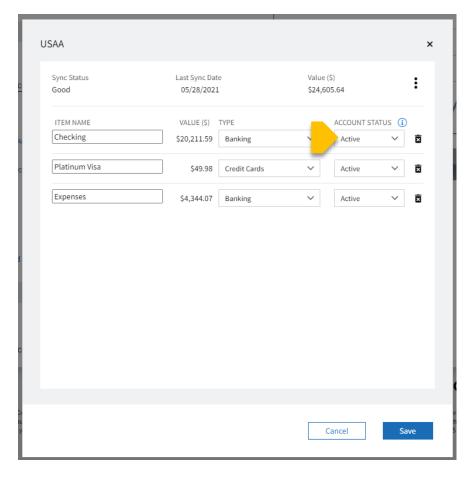
Locate the **Additional Assets** section on the **Portfolio > Overview > Balances** tab.



Select the name of an account to edit, then select **Edit**. Change the account name as needed.



Hide Accounts

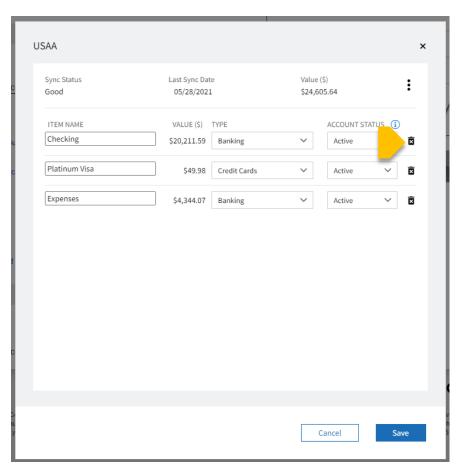


To hide an account from appearing in Investor360°, change its **Account Status** to **Inactive**.

Hiding an account keeps the historical data without showing the account anywhere in Investor360°.

If you change your mind later, you can change the **Account Status** back to **Active**.

Delete Accounts



Deleting an account removes all historical data. Deleted accounts can't be added back later. Once deleted, you must delete the entire institution and re-link it to see all accounts again. Deleting the institution removes all historical data for all other accounts at that institution.

Select the **Trash** icon to delete an account.