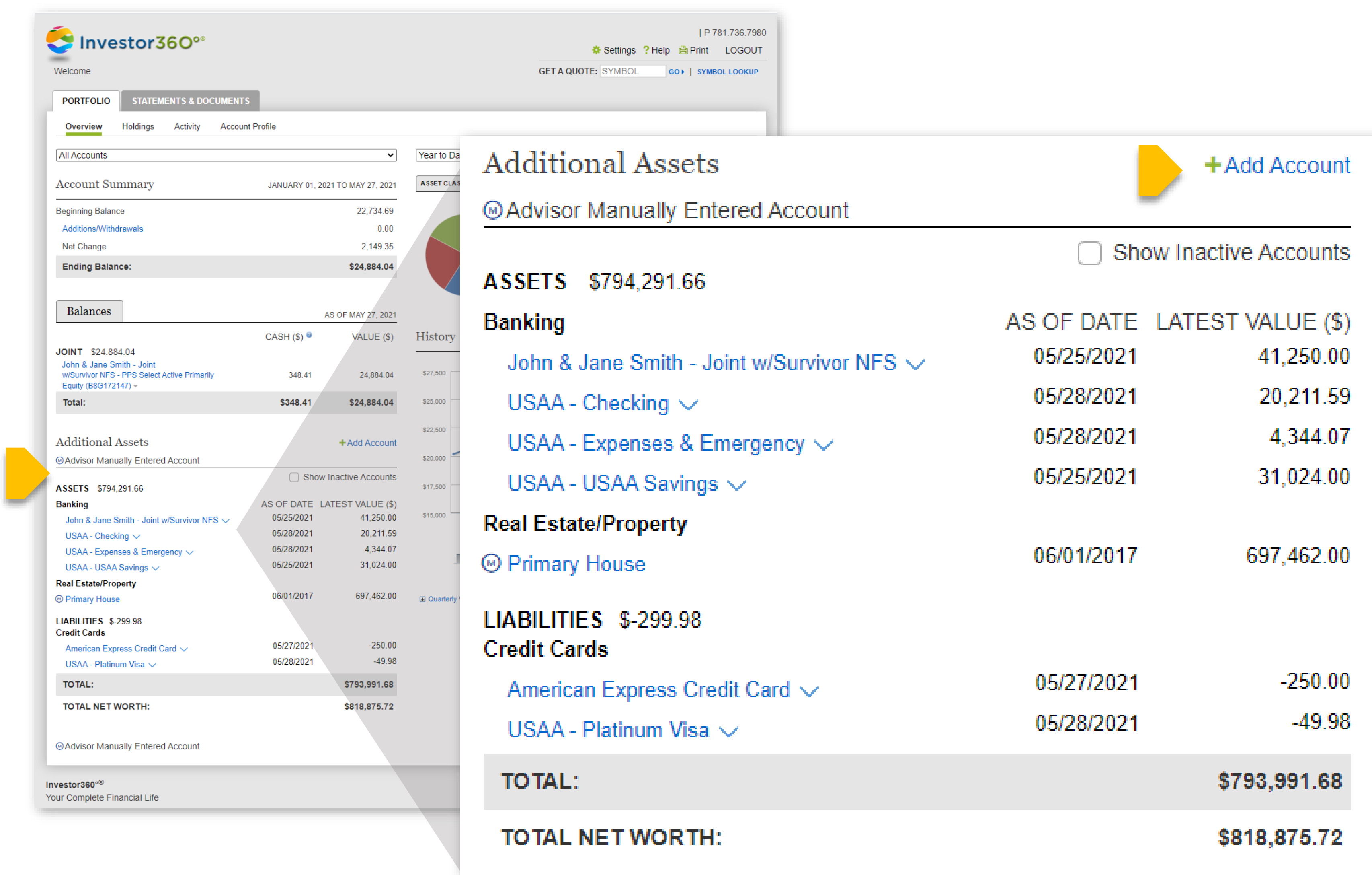
Investor360°® Adding External Accounts to **Investor360°**

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

2 Select **Add Account.**

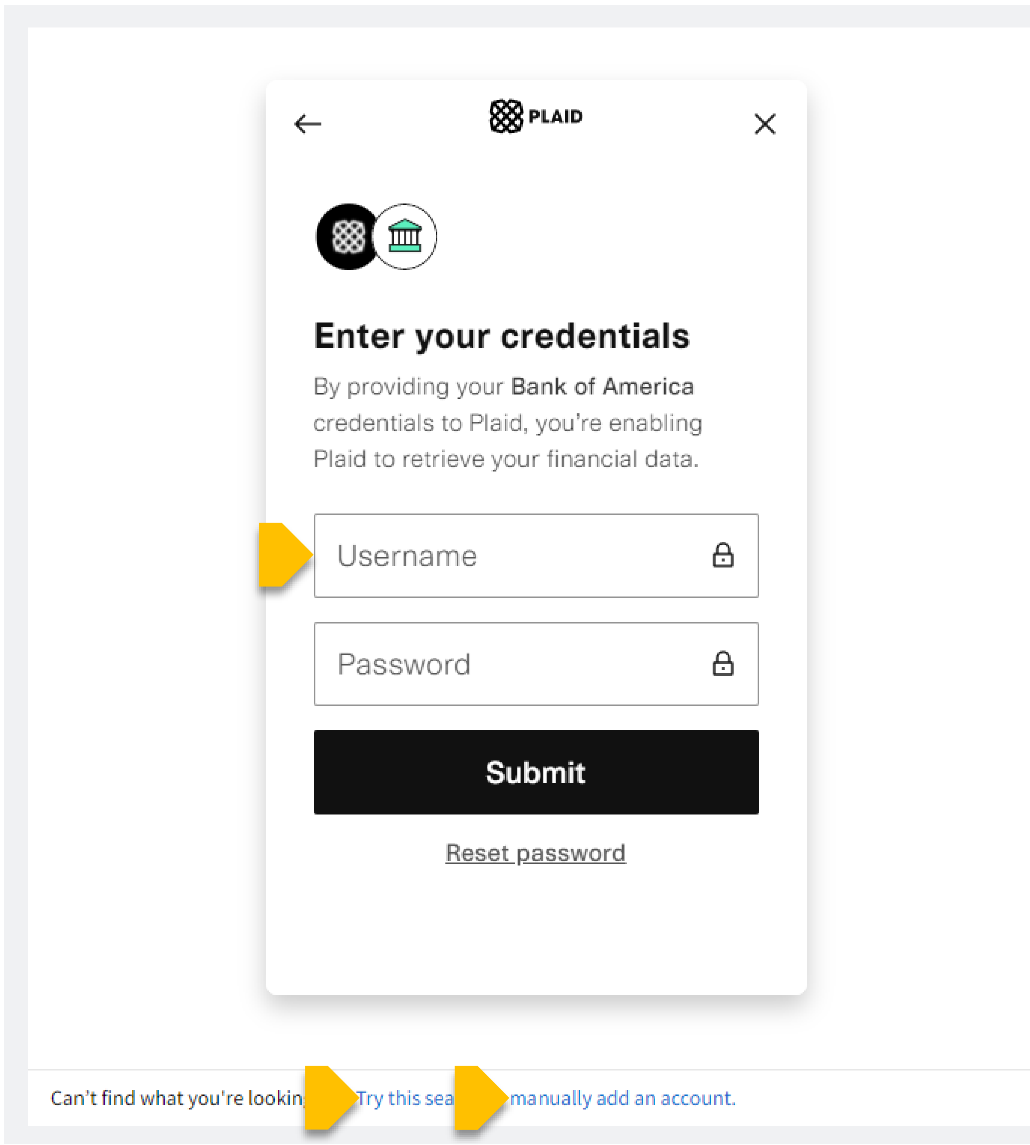


3 To automatically connect your account, select your financial institution from the list, then enter your credentials.

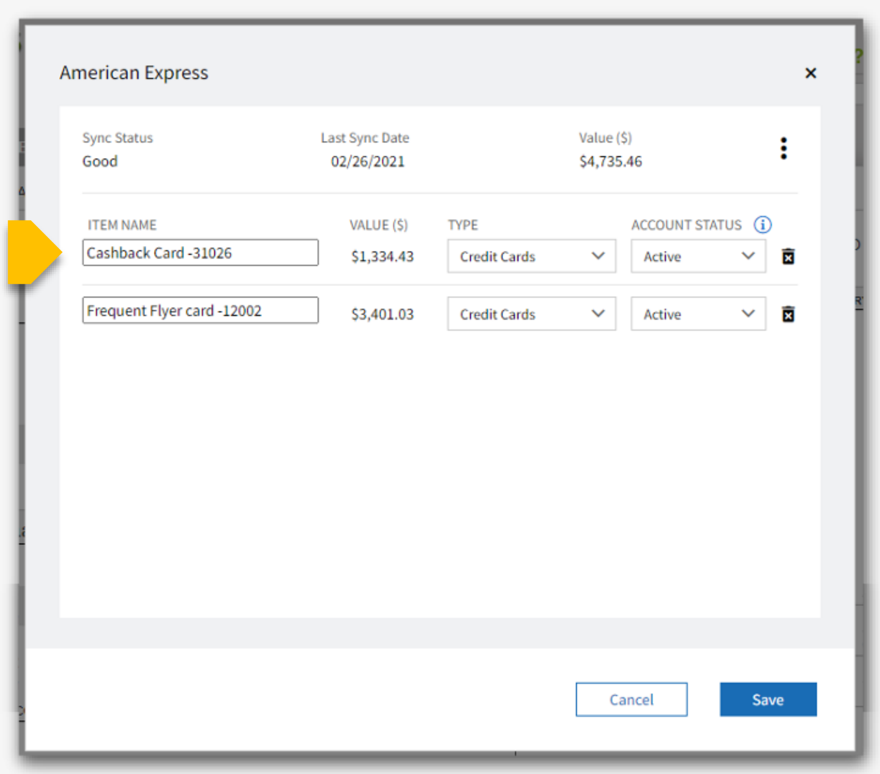
Due to enhanced security requirements, some financial institutions may require you to enter the credentials a second time.

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

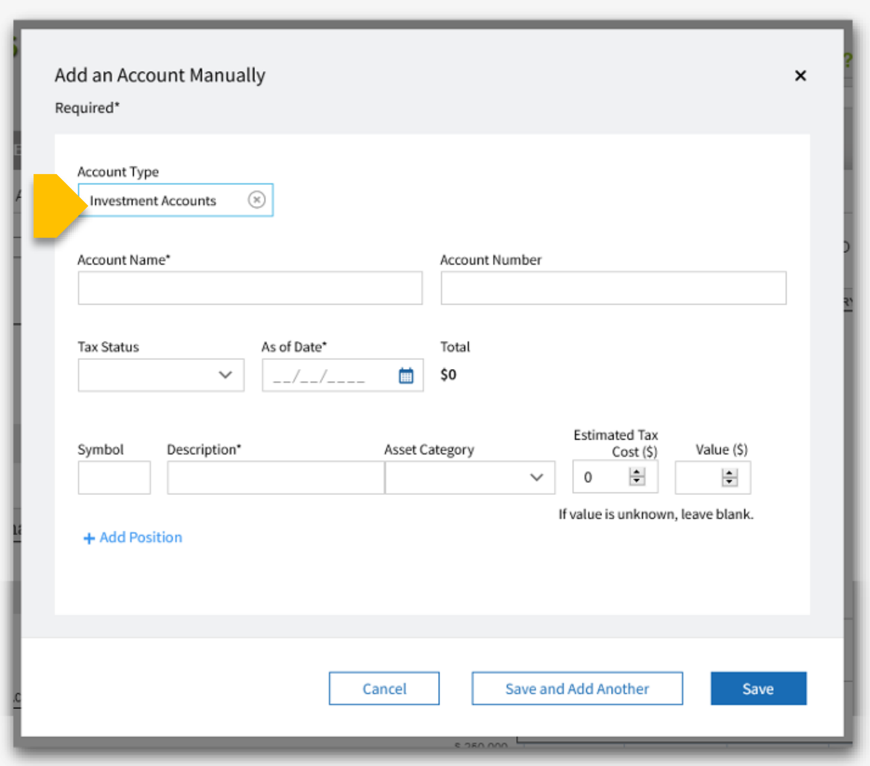
To manually add your account without connecting to a bank, select **Manually enter account information.**



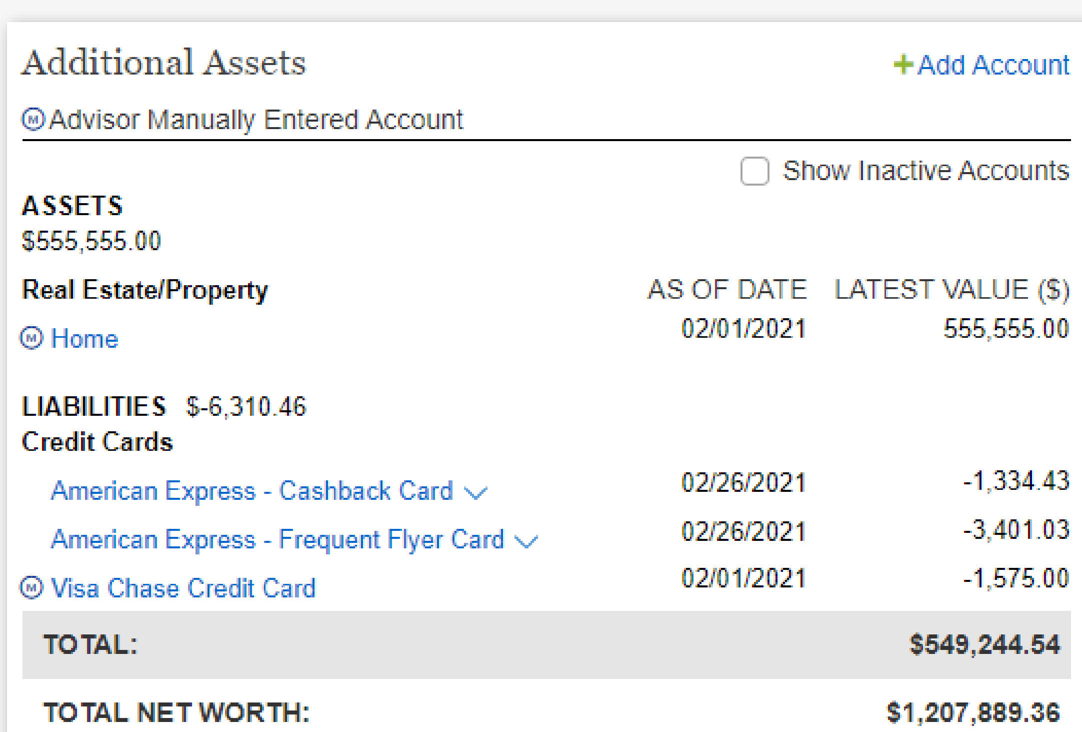
4 After connecting, edit the account's name to give it a descriptive title, then select **Save**.



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



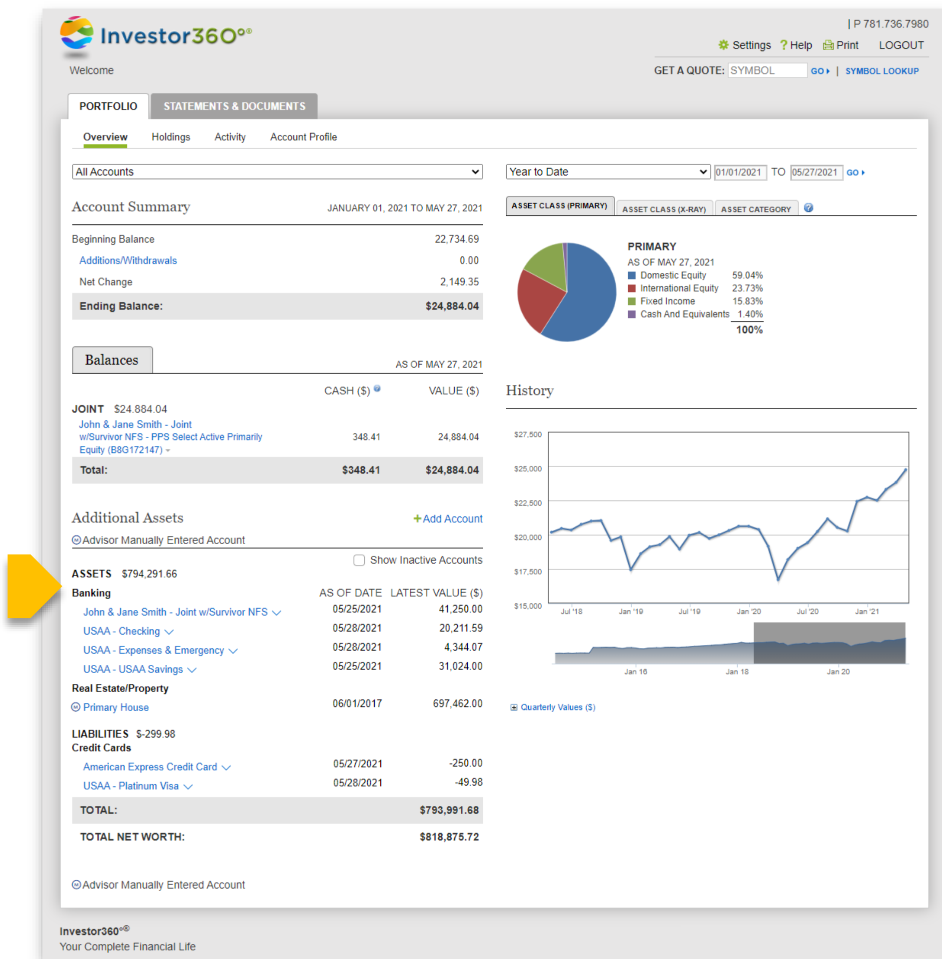
6 The external accounts are shown in the **Additional Assets** section and the **Holdings** subtab.



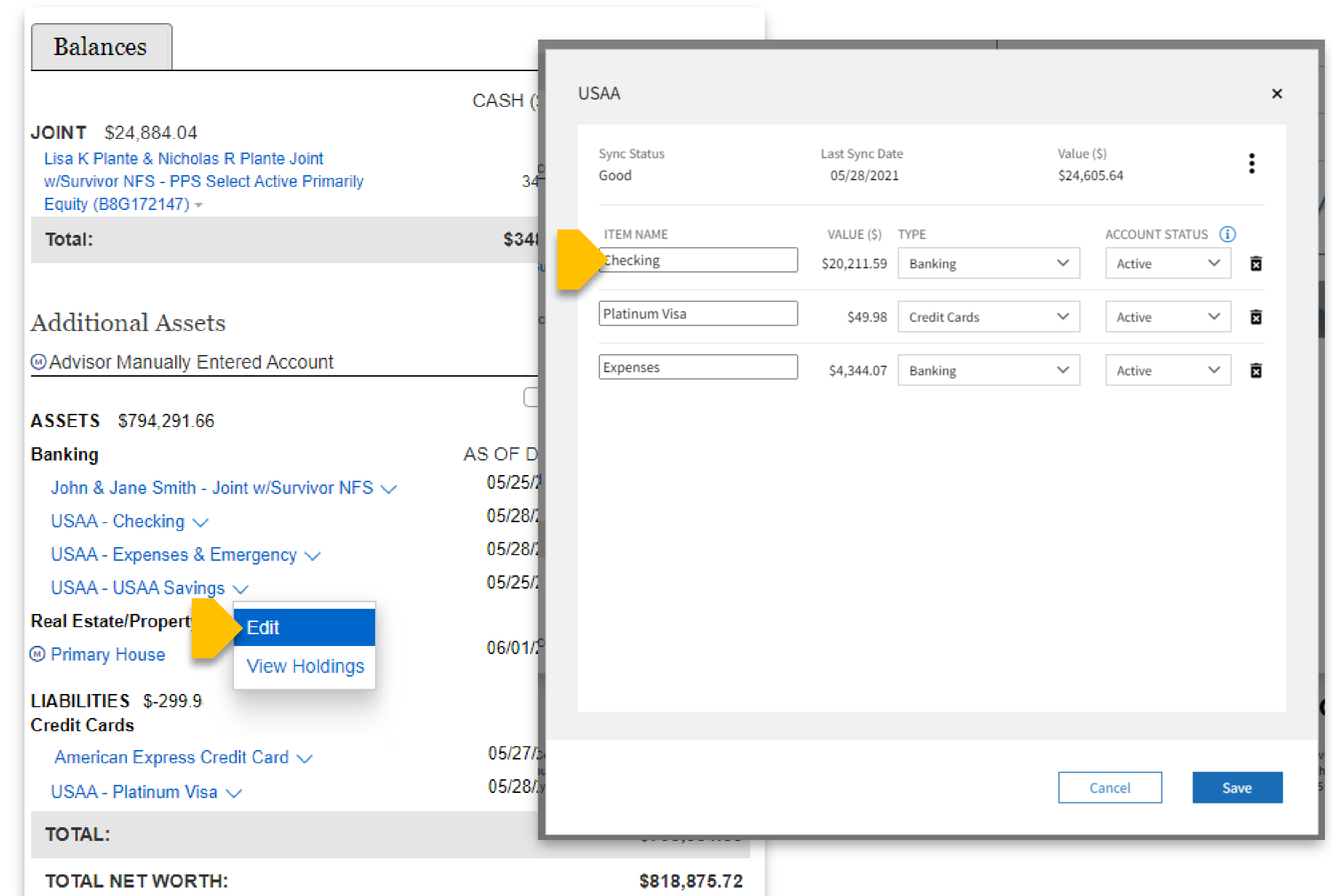
Investor360°® Editing External Accounts in Investor360°

Edit Account/View Holdings

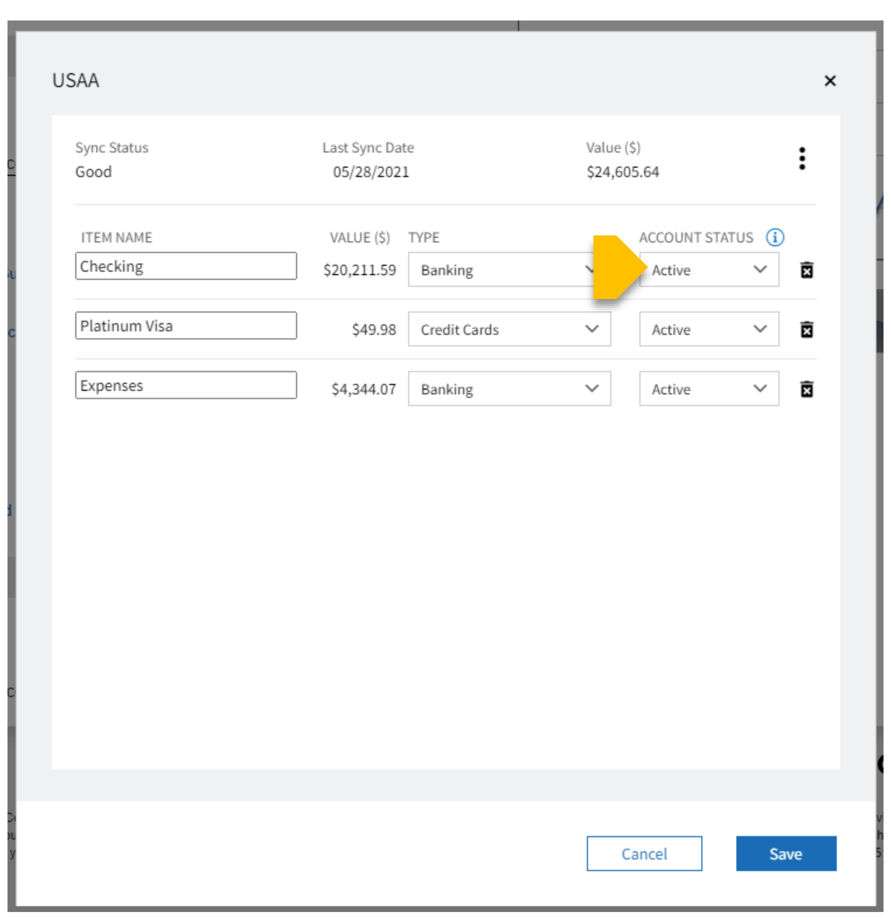
1. Locate the **Additional Assets** section on the **Portfolio** > **Overview** > **Balances** tab.



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



Hide Accounts

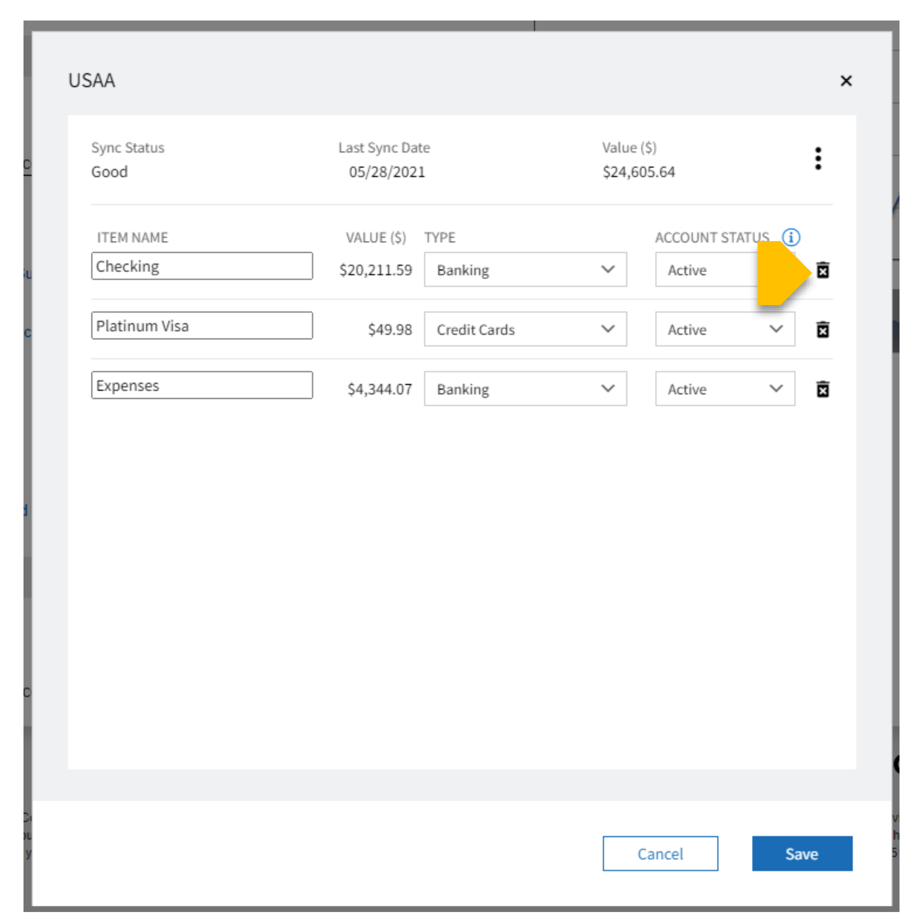


To hide an account from appearing in Investor360°, change its **Account Status** to **Inactive**.

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.