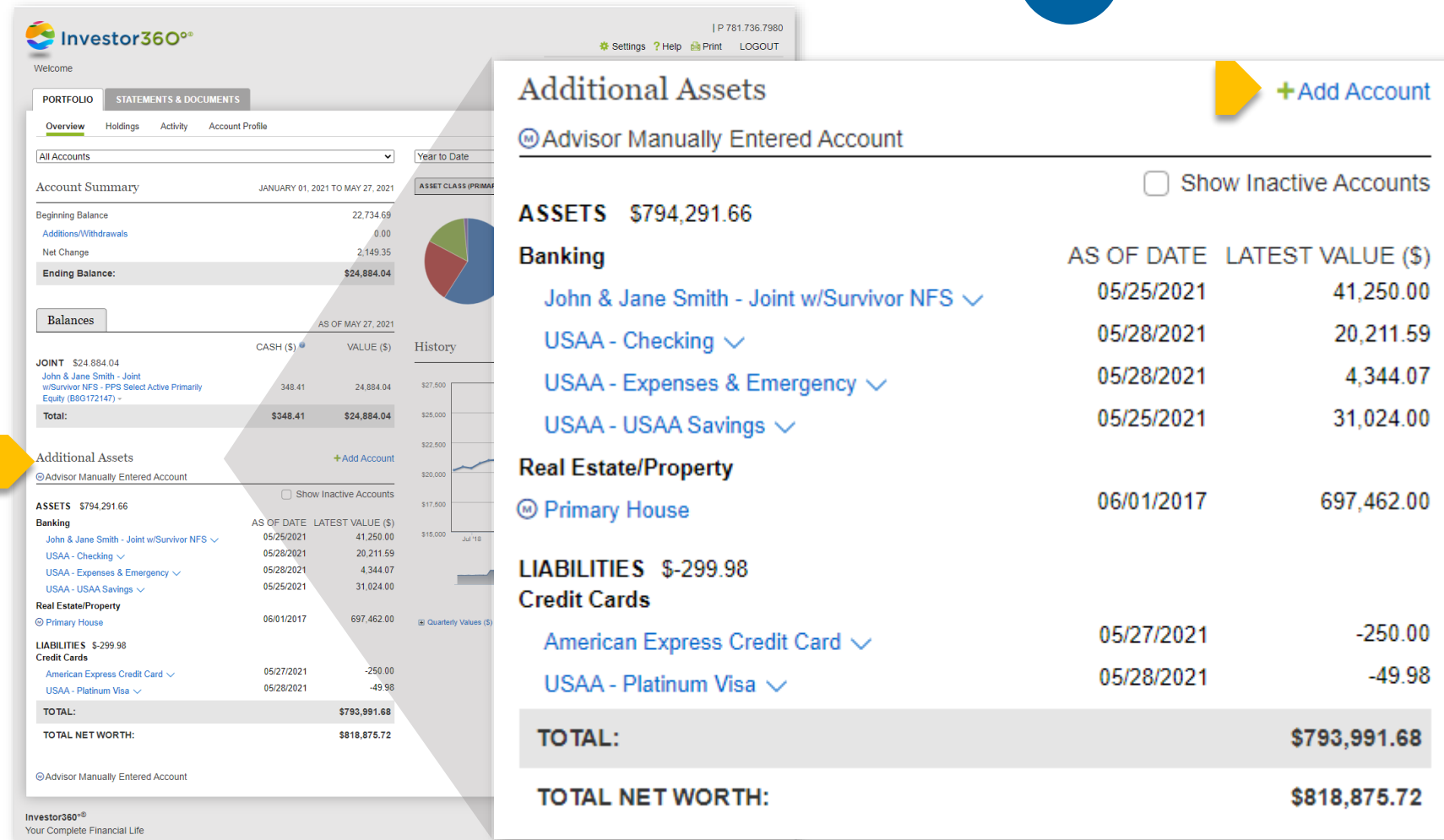


1 Locate the **Additional Assets** section on the **Portfolio > Overview > Balances** tab.



**Additional Assets** + Add Account

Advisor Manually Entered Account

ASSETS \$794,291.66

Banking

AS OF DATE	LATEST VALUE (\$)
05/25/2021	41,250.00
05/28/2021	20,211.59
05/28/2021	4,344.07
05/25/2021	31,024.00

Real Estate/Property

Primary House 06/01/2017 697,462.00

LIABILITIES \$-299.98

Credit Cards

05/27/2021	-250.00
05/28/2021	-49.98

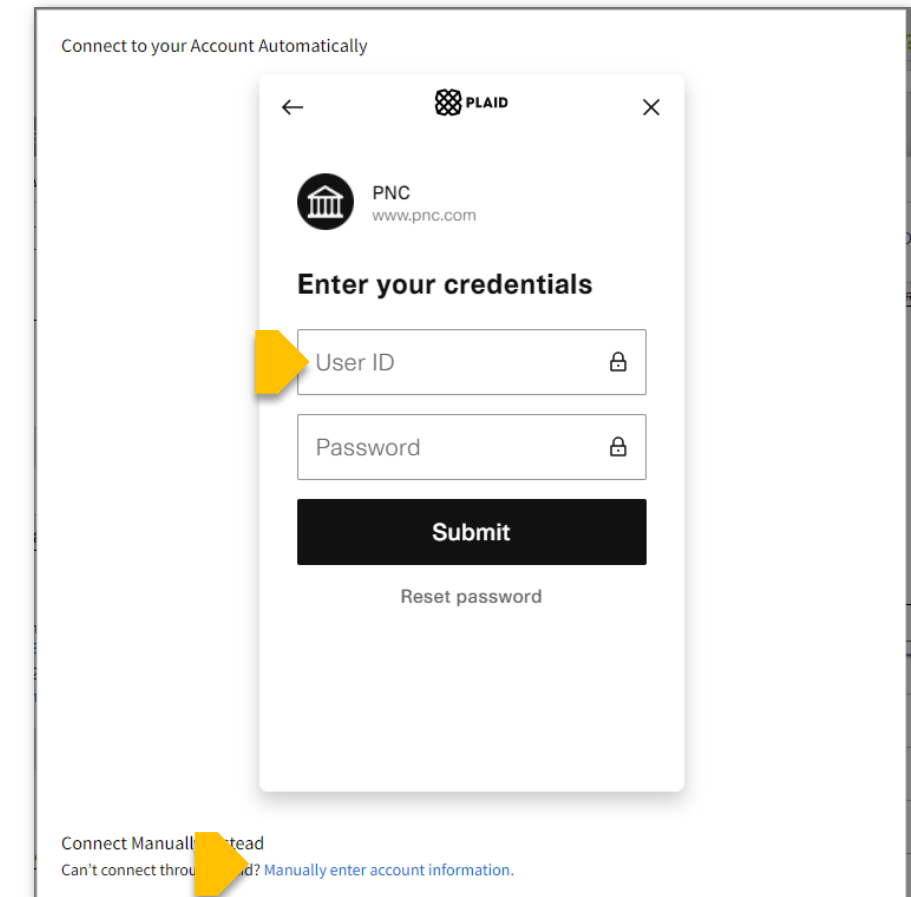
**TOTAL: \$793,991.68**

**TOTAL NET WORTH: \$818,875.72**

2 Select **Add Account**.

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

To manually add your account without connecting to a bank, select **Connect Manually Instead**.



Connect to your Account Automatically

PNC  
www.pnc.com

Enter your credentials

User ID

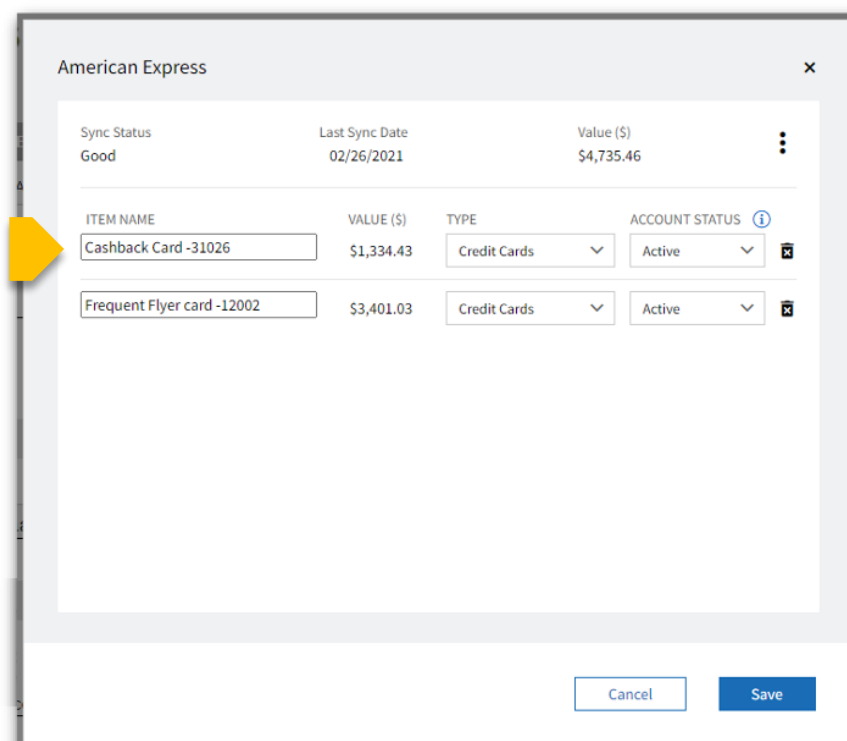
Password

Submit

Reset password

Connect Manually Instead  
Can't connect through PLaid? Manually enter account information.

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



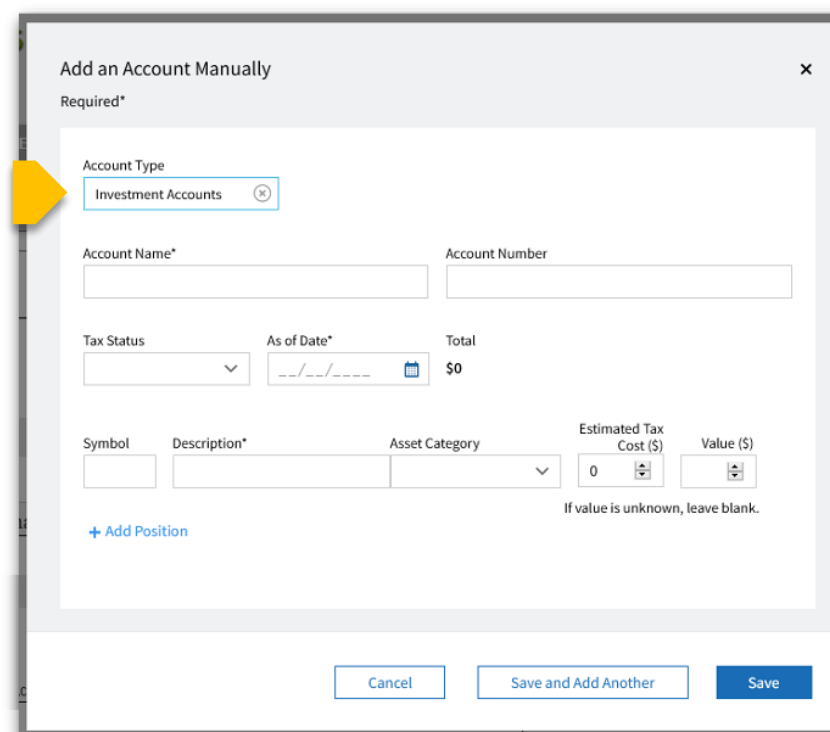
American Express

Sync Status: Good, Last Sync Date: 02/26/2021, Value (\$): \$4,735.46

ITEM NAME	VALUE (\$)	TYPE	ACCOUNT STATUS
Cashback Card -31026	\$1,334.43	Credit Cards	Active
Frequent Flyer card -12002	\$3,401.03	Credit Cards	Active

Cancel Save

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



Add an Account Manually

Required\*

Account Type: Investment Accounts

Account Name\* Account Number

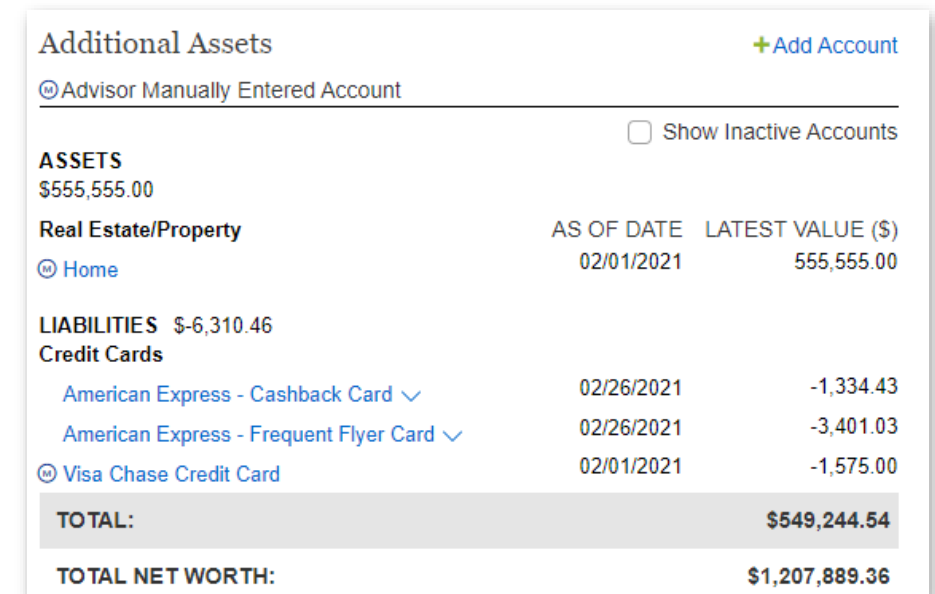
Tax Status As of Date\* Total \$0

Symbol Description\* Asset Category Estimated Tax Cost (\$) Value (\$)

+ Add Position

Cancel Save and Add Another Save

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



**Additional Assets** + Add Account

Advisor Manually Entered Account

ASSETS \$555,555.00

Real Estate/Property

Home 02/01/2021 555,555.00

LIABILITIES \$-6,310.46

Credit Cards

02/26/2021	-1,334.43
02/26/2021	-3,401.03
02/01/2021	-1,575.00

**TOTAL: \$549,244.54**

**TOTAL NET WORTH: \$1,207,889.36**

## 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<sup>®</sup>, change its **Account Status** to **Inactive**.

Hiding an account keeps the historical data without showing the account anywhere in Investor360<sup>®</sup>.

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.