Assigning Attributes to Accounts

Through Wealth Passport's Portfolio Explorer, you can group accounts by characteristics that are meaningful to you.

WHY ATTRIBUTES?

An "attribute" is a characteristic, defined by you, that will help you organize your accounts. This is a powerful customization feature of Wealth Passport because attributes provide you with the ability to organize accounts in a way that is meaningful to you and your family.

You may create up to five attributes then assign unlimited "values" and accounts to each.

A value can be assigned to an attribute, but it is not necessary. Accounts can be assigned to an attribute directly without adding a value. For example, you create an attribute named Family Member, you then select "add value" to add the family members by name to the Family Member attribute you just created. Once the values (in this example, the family member names) are added to the attribute you are now ready to assign accounts to each value.

Examples of attributes	Examples of values you may choose to assign
"Family Member"	family member names
"Investment Manager"	investment manager names
"Manager Style"	asset allocation sectors

> Only assigned client administrators can create, edit and delete attributes, but all users can view attributes.

HOW TO CREATE AN ATTRIBUTE

1. Under the **Account Utilities** tab, select **Attributes** to open the **Attributes** page.
2. Define an attribute's name by clicking the **pencil** icon. (Any attribute that has not been named defaults to "Undefined.")
3. Type a name in the **Edit Attribute** box.
4. Click **Save.**

EDITING OR DELETING ATTRIBUTES

From the **Attributes** page, click on the **pencil** button to edit an attribute's name or click the ✖ button next to the **pencil** to delete an attribute. Note: Deleting an attribute will also delete the underlying values assigned to the attribute and will no longer have accounts associated with those values.

ADDING VALUES TO ATTRIBUTES

From the **Attributes** page, click on the **Add Value** button below the specific attribute window to which you wish to add values (see *below*).
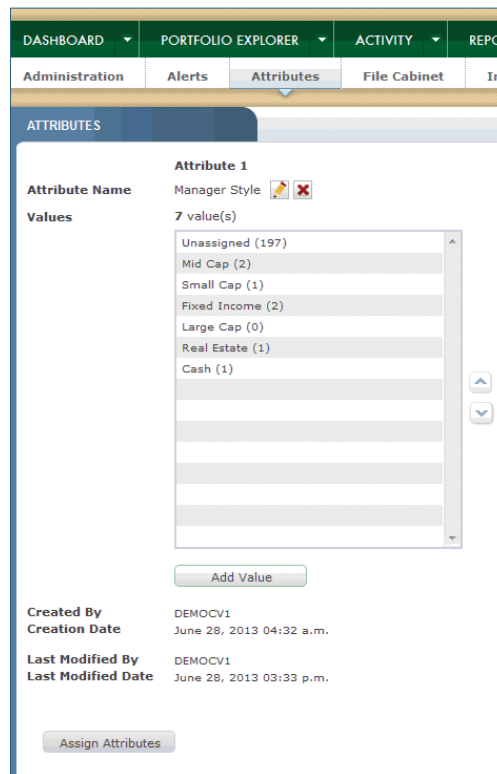
The **Add Attributes Values** box will open (*see at right*). Add a value in the **Value Label** box and click **Add**. You can add an unlimited number of values to an attribute.

EDITING OR DELETING ATTRIBUTE VALUES

From the **Attributes** page, an attribute value can be edited (**pencil**) or deleted (**X**) by selecting the value and then selecting the appropriate icon. The icons will be displayed only when the specific attribute value is selected. Upon clicking **Save**, a window will pop up to confirm you want to delete the value.

HOW TO ASSIGN ACCOUNTS TO ATTRIBUTE VALUE

1. It is necessary to highlight a value to enable the **Assign Attributes** button, as shown below right.
2. Click the **Assign Attributes** button in the bottom left corner of the **Attributes** page.
3. The **Assign Accounts to Attribute** window below will launch. (Note: At the top of this window the **Select accounts to assign to**.... message indicates what attribute you are working within.)
4. Place a checkmark in the box beside the account you wish to assign. Use the account filters to narrow the account list if needed.
5. Choose the value you wish to assign the account(s) to by clicking the arrow beside the **Assign selected accounts to** box.
6. Click **Assign** to save your changes.
7. Click **Close** when you are done assigning accounts to attribute values.
8. The main **Attributes** page appears. From here you can highlight a value in another attribute container and follow the steps above to modify accounts for that attribute.
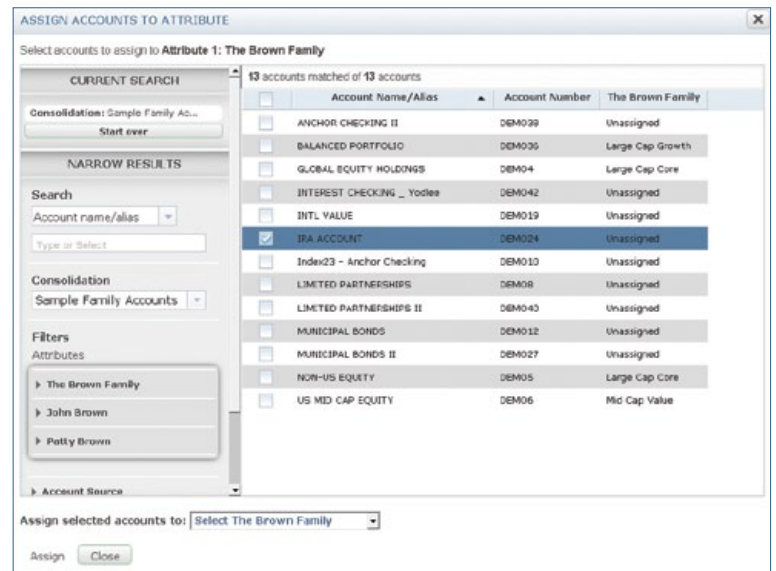
> To view the accounts that have been assigned to a value, you may select the specific value on the current search panel, and only those accounts for that value will be displayed.

NEED HELP?

If you have any questions or would like more information, call the Northern Trust Passport® Help Center at 888-635-5350 (312-557-5900 outside the United States) Monday through Friday from 7:00AM – 9:00PM Central Time, Saturday and Sunday from 7:00AM – 3:30PM Central Time.