



Personalizing Your Dashboard

Wealth Passport provides a customizable page – called a dashboard – for market information, news, tools and reports to help you manage your portfolio. With the dashboard you can quickly see “the big picture” then drill down to details.

You may establish up to five dashboard pages in addition to the pre-defined dashboard home page.


HOW TO ADD A DASHBOARD PAGE

1. Click on the **Dashboard** tab so the dashboard home page opens.
2. Select **Add Page**.
3. In the **Add Page** window that opens, give the page a name and click **Save**.

NAVIGATING BETWEEN DASHBOARD PAGES

Click the **Dashboard** tab in the top banner, then select the page you wish to display.

HOW TO ADD CONTENT TO A DASHBOARD PAGE

1. Click **Add Content** in the upper right-hand corner of the dashboard page. The **Add Content** menu that pops up will display available content by category.
2. Click the **Add** button for the window of content (“portlet”) you would like to add. You may add several portlets at one time. Hover over the magnifying glass  to expand the view to see what the content looks like.
3. Click the **Close Content** button and see your new portlet displayed.

DELETING CONTENT FROM A DASHBOARD PAGE

To delete a portlet, simply click the **X** in the upper right hand corner of the portlet you want to delete and confirm your deletion.

HOW TO REPOSITION PORTLETS

1. Within the dashboard home page, identify the portlet you would like to move and position the mouse over the drag and drop indicator, (see at right) click and hold.
2. Drag the selection up or down to its new position and release.



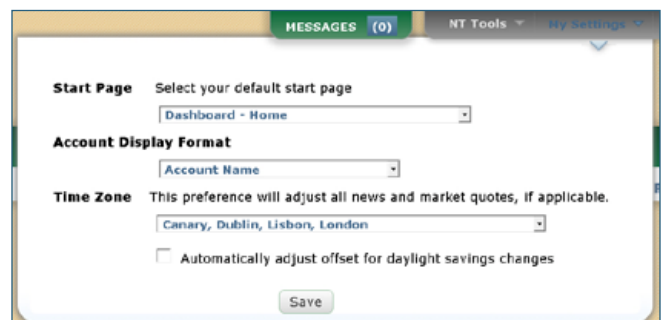
HOW TO DELETE OR RENAME A DASHBOARD PAGE

1. Click the down arrow (▼) to the right of the name on the dashboard page you want to delete or rename.
2. To rename the page, highlight the text you want to change, enter new text and click **Save**.
3. To delete the page, click the **Delete Page** checkbox and click **Save**.

SELECTING YOUR SETTINGS

How to Select Your Start Page

1. Go to **My Settings** in the upper right-hand corner of any Wealth Passport page.
2. Choose your default start page from the **Start Page** dropdown menu (see below) and click **Save**.



You can make any page your Start Page by clicking on **Make this my Start Page** at the top of any page throughout the site.





How to Change the Way Your Accounts are Displayed

1. Go to **My Settings** in the upper right-hand corner of any Wealth Passport page.
2. Click on the **Account Display Format** dropdown and choose from the following options to view you accounts by:
 - Account Name
 - Account Name - Account Number
 - Account Number
 - Account Number - Account Name
3. Click **Save**.

How to Select a Time Zone

This preference will adjust your news and market quotes, if applicable.

1. Go to **My Settings** in the upper right-hand corner of any Wealth Passport page.
2. Choose your location from the **Time Zone** dropdown menu. Check the box to automatically adjust for daylight savings changes.
3. Click **Save**.

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.

Securities products and services are offered by Northern Trust Securities, Inc., member FINRA, SIPC, and a wholly owned subsidiary of Northern Trust Corporation.

