



Using the Search Engine

Wealth Passport’s dynamic search engine – maintained within Portfolio Explorer – enables you to quickly browse your portfolio information by narrowing the scope of your search with intuitively defined filters that will isolate just the data you wish to see. You will be able to search 90 calendar days of historical data.

INITIATING A SEARCH

In **Portfolio Explorer**, **Basic Filters** are displayed in the left side panel of your screen.

BASIC FILTERS

- **Search** – allows users to search within their portfolio by applying the following filters:
 - Account name/alias
 - Account number
 - CUSIP
 - Holding name
 - ISIN
 - SEDOL
 - Symbol (stock symbol)
- **Account**
- **Consolidation**

You can open Portfolio Explorer’s **expanded filters** from the **Basic** filter panel. In the upper right corner of the basic search, click **“More Filters”** and the expanded filter options will open.

Expanded Account Filters

- **Attributes**
- **Base Currency**
- **Account Source**
- **Account Type**
- **Cash Balance**

Expanded Holding Filters

- **Country of Risk**
- **Industry Sector**
- **Primary Exchange**
- **Security Category**

Expanded Transaction Filters

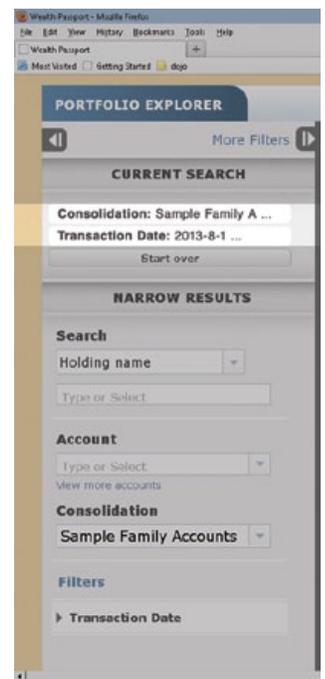
- **Transaction Amount**
- **Transaction Category**
- **Transaction Date**
- **Transaction Status**

USING FILTERS TO NARROW OR EXPAND YOUR SEARCH

Filters allow you to view just the items you specify for your search, such as a specific holding within a targeted group of accounts, what holdings are in a particular sector or just the transactions executed in the last week. Select the filter(s) you would like to use for your search, and then click the **View results** button from the expanded search window to start a search.

The Portfolio Explorer expanded search will close and return the results in the center panel while displaying the search criteria selected at the top of the Basic Search panel (see at right). This is a valuable tool because it also allows you to easily:

- Narrow results by adding a filter.
- Expand results by removing a filter.
- Start over by removing all filters and search results with the exception of the consolidation setting (which you will need to reset to the appropriate consolidation desired).





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.

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