

ADDITIONAL ASSETS

THE ADDITIONAL ASSETS SECTION DISPLAYS A LIST OF OUTSIDE ASSETS ASSOCIATED WITH THE ACCOUNT, SUCH AS BANK ACCOUNTS, LOANS, CREDIT CARDS, AND SO FORTH. IF AN ASSET NEEDS TO BE UPDATED, YOU WILL SEE A YELLOW TRIANGLE NEXT TO IT. THE ABILITY TO ADD/EDIT ADDITIONAL ASSETS IS LOCATED WITHIN THE HOLDINGS TAB OF INVESTOR360[®]

To add additional assets:

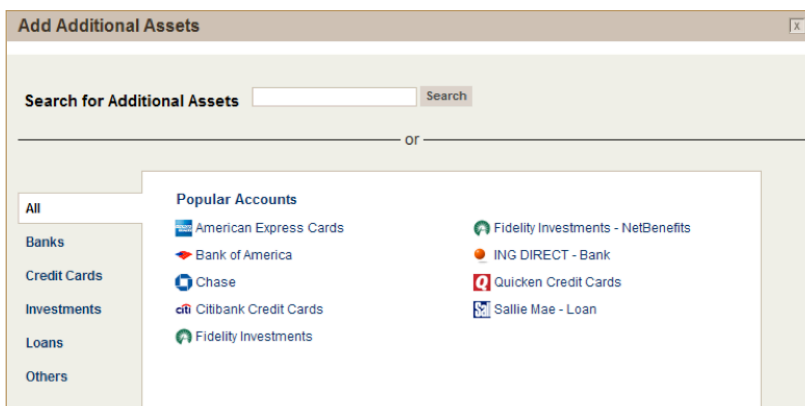
1. From the Holdings tab, click **Add/Edit Additional Assets**. Assets already active on the account appear.



2. Click **Add an Additional Asset**.



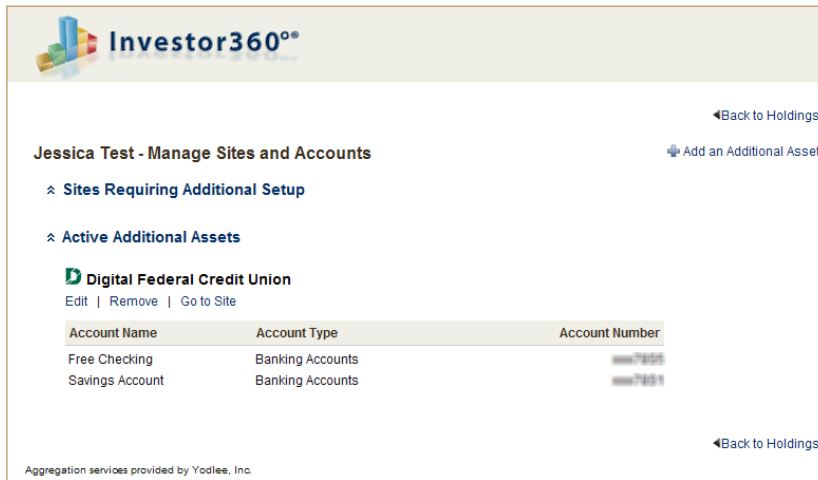
3. Click on an institution within the categories displayed on the left, or search for assets by using the search function.



4. Once the asset is found, click the asset link.
5. Enter the appropriate login information for the asset and click **Add Account**. Investor360° will retrieve the account information.
6. Repeat steps 3–5 for any account that you would like to add.
7. Click **Back to Holdings** to return to the Holdings tab of Investor360°.
8. The accounts you added will appear on the Holdings and Overview > Balance tabs.

To edit additional assets:

1. Click **Add/Edit Additional Assets**. Assets already active on the account will appear.
2. Click the **Edit** link for the asset.



3. Verify the login information.
4. Click **Update Account**.

To remove additional assets:

1. Click **Add/Edit Additional Assets**. Assets already active on the account will appear.
2. Click the **Remove** link for the asset.
3. Verify the request and click **Remove**. Investor360° removes the asset.
4. Click **View and Edit Your Remaining Assets**.

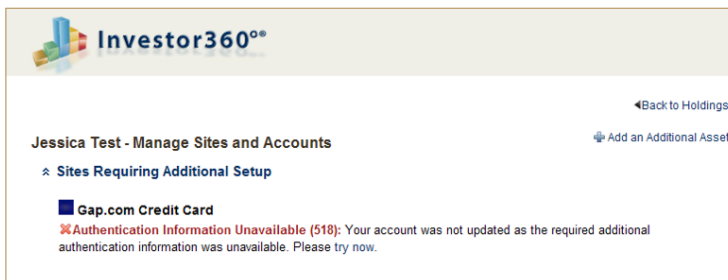
Handling errors on additional assets

A yellow triangle appears next to an additional asset if we were unable to update the account. This can happen for a variety of reasons, including:

- You changed your login information at the end site and have not updated the information within Investor360°
- The end site is looking for the response to an unanswered security question in Investor360°
- The end site is requiring that you acknowledge terms and conditions or some promotional offer before the account can be updated through Investor360°

If you see an error on an additional asset added to Investor360°:

1. Click **Add/Edit Additional Assets**.
2. Accounts that require your attention appear in the Sites Requiring Additional Setup section.



3. Read the message that describes the cause of the error. The message will include a link to update the information.