Advisor Dashboard Reference Guide

This reference guide highlights how to access and use the Advisor Dashboard to search for account information.

Advisor Dashboard Overview

Use the links below to navigate to instructions on how to complete the following actions in AddVantage:

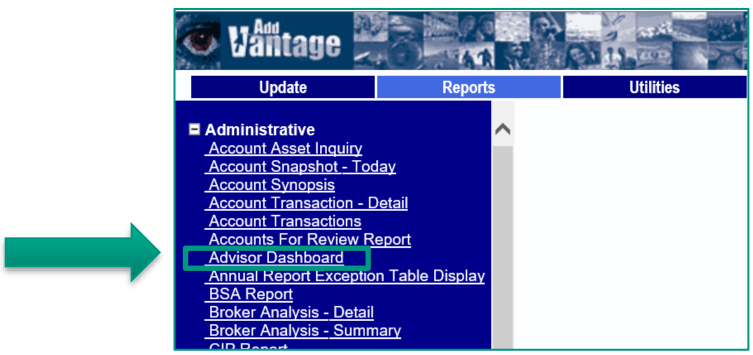
- Access the Advisor Dashboard
- Look Up Detailed Account Information
- Set Advisor Dashboard as AddVantage Home Page

Advisor Dashboard

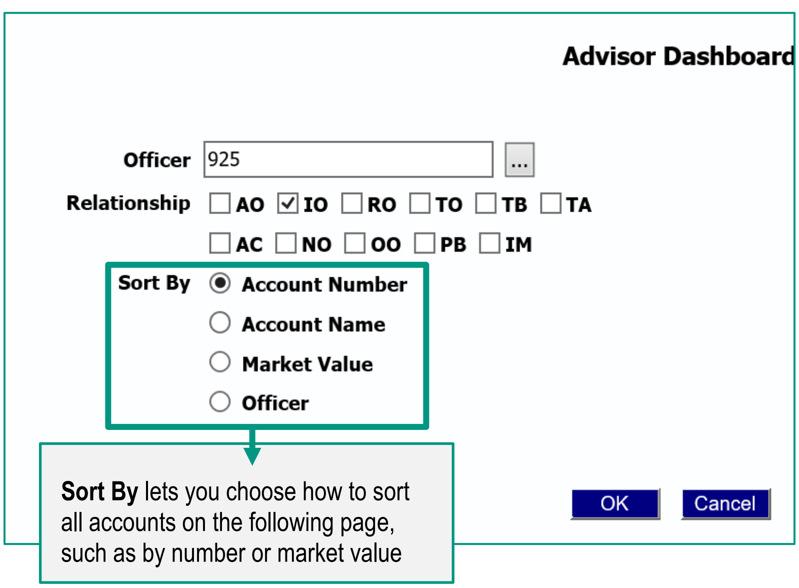
Access the Advisor Dashboard

AddVantage's Advisor Dashboard allows you to easily view all your accounts in one place and easily look into different account details, such as Interested Parties, tax, and bank information.

Access the Advisor Dashboard by going to **Reports > Administrative**, then clicking **Advisor Dashboard**, as shown below.



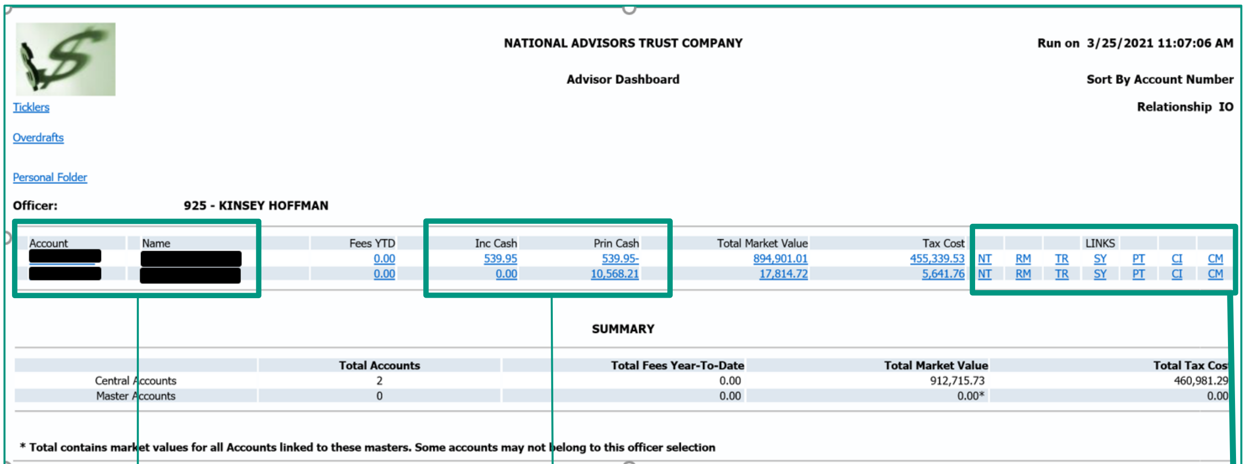
After opening the Advisor Dashboard, enter your **Officer ID** and select your **Relationship** code (e.g., AO, IO, RO – a table listing these is below), then click **OK**.



Relationship Code	Code Meaning
AO	Administrative Office
IO	Investment Officer
RO	Real Estate Officer
TO	Tax Officer
TB	Trust Broker
TA	Trust Administrator
AC	Accountant
NO	New Business Officer
OO	Other Officer
PB	Private Banking Officer
IM	Investment Manager

If you do not know your **Officer ID**, click the ellipsis (…) and select the officer code specific to your name or your advisor's name. Please note, multiple officer codes can be displayed at one time by entering the codes with a space between (e.g., 111 222).

Once you enter your Officer ID and Relationship code, you will see all accounts at a glance, including the Account Number, Name, available cash balances of the Income and Principal portfolios, and total account values, as shown below.



NATIONAL ADVISORS TRUST COMPANY

Advisor Dashboard

Run on 3/25/2021 11:07:06 AM

Sort By Account Number

Relationship IO

Ticklers

Overdrafts

Personal Folder

Officer: 925 - KINSEY HOFFMAN

Account	Name	Fees YTD	Inc Cash	Prin Cash	Total Market Value	Tax Cost	LINKS						
[redacted]	[redacted]	0.00	539.95	539.95-	894,901.01	455,339.53	NT	RM	TR	SY	PT	CI	CM
[redacted]	[redacted]	0.00	0.00	10,568.21	17,814.72	5,641.76	NT	RM	TR	SY	PT	CI	CM

SUMMARY

	Total Accounts	Total Fees Year-To-Date	Total Market Value	Total Tax Cost
Central Accounts	2	0.00	912,715.73	460,981.29
Master Accounts	0	0.00	0.00*	0.00

* Total contains market values for all Accounts linked to these masters. Some accounts may not belong to this officer selection

Account displays the account number for each listed account, while **Name** displays the account owner

Inc Cash and **Prin Cash** reflect the available cash balance for Income and Principal for each account, respectively

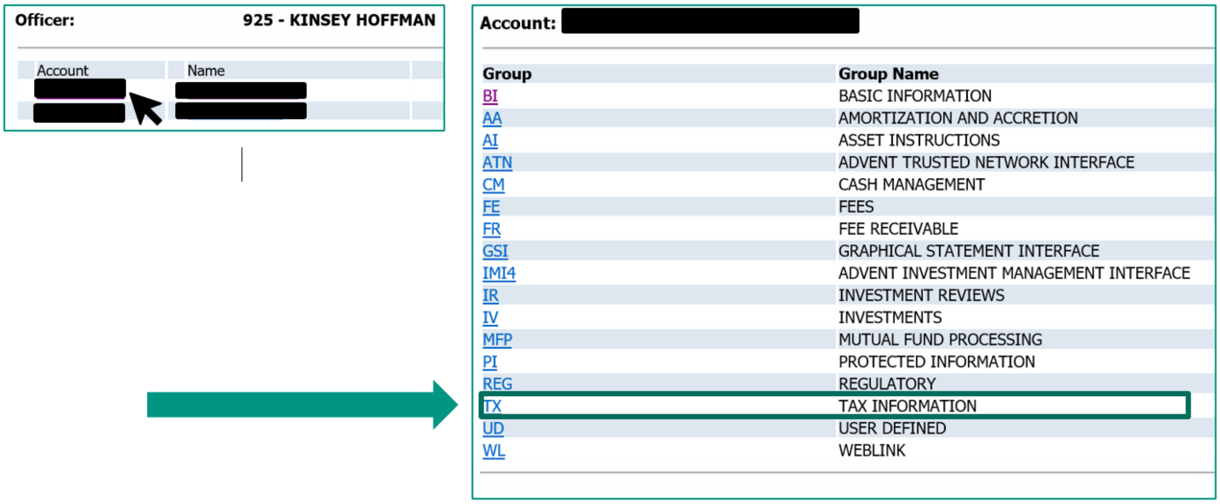
In addition, the right-side of the Advisor Dashboard includes Links for each account that allow you to easily click and look up specific information, such as remittance listing and contact information, as shown below.

			LINKS			
NT	RM	TR	SY	PT	CI	CM
Account Notes	Remittance List	Transaction Listing	Synoptic Record	Pending Trades	Contact Information	Cash Management

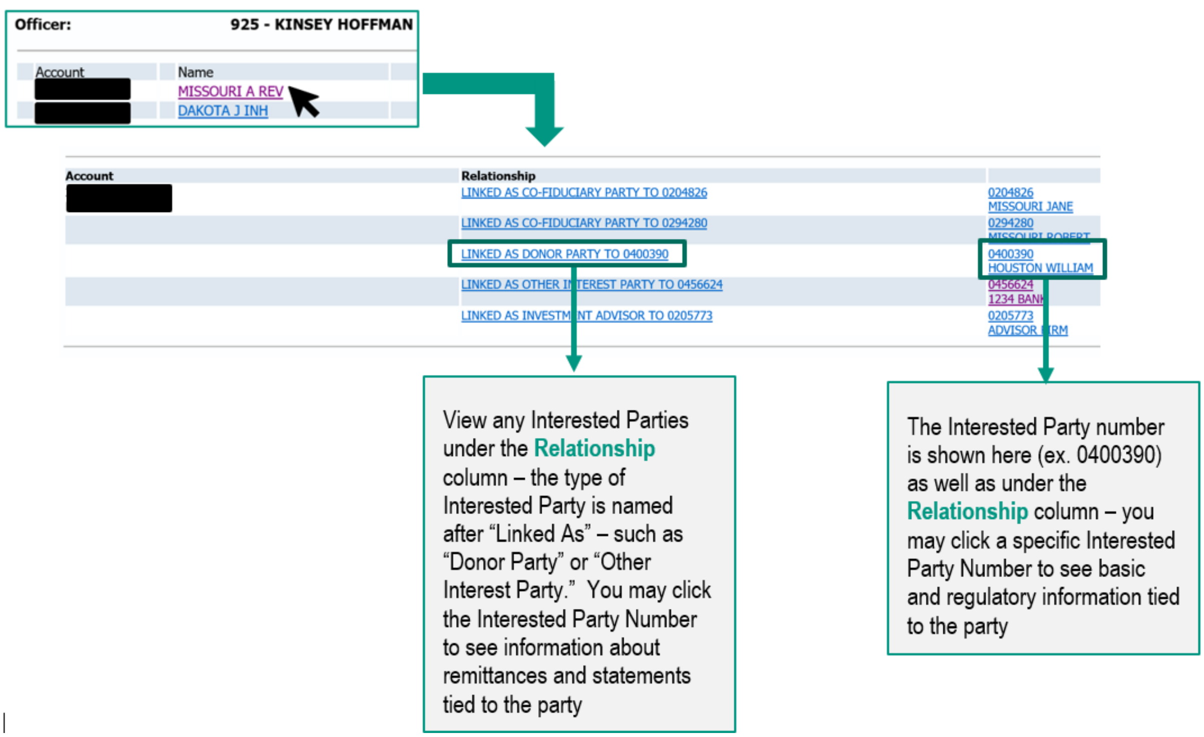
Detailed Account Information

Look Up Detailed Account Information

From the above dashboard view, you can easily look up various account details by clicking on the **Account Number** in the left column, as shown below. From this view, you can click any link under the **Group** column to go to a detailed page, such as clicking "TX" to view Tax Information and Federal and State Withholding on record for the account.



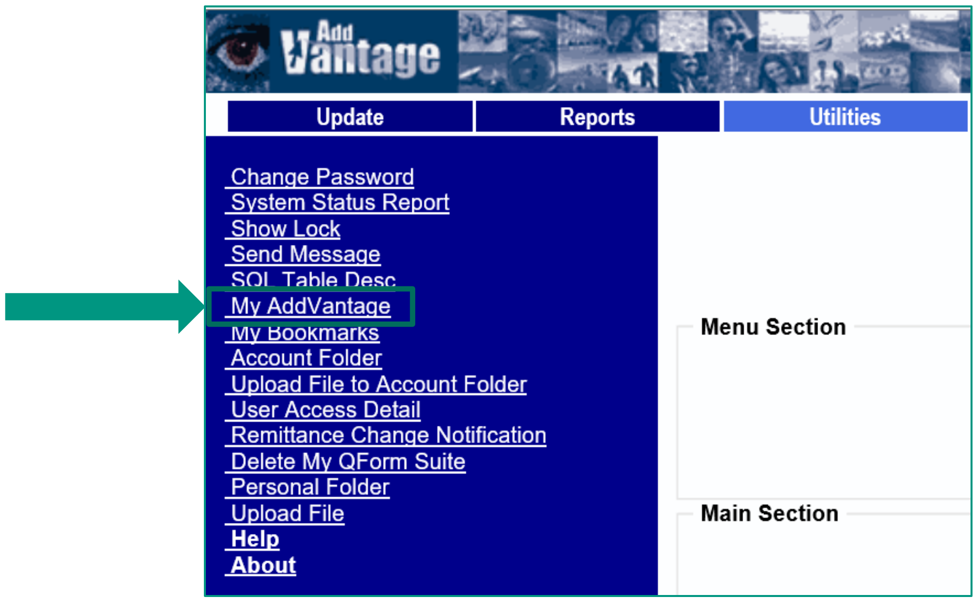
Similarly, click on the **Name** field to see all Interested Parties tied to the account and their respective relationships, as shown below. This information is essential when filling out forms and form suites for disbursements, which require the Interested Party Number receiving the disbursement, as well as their relationship to the account (e.g., Accountant, Beneficiary, Donor, Other).



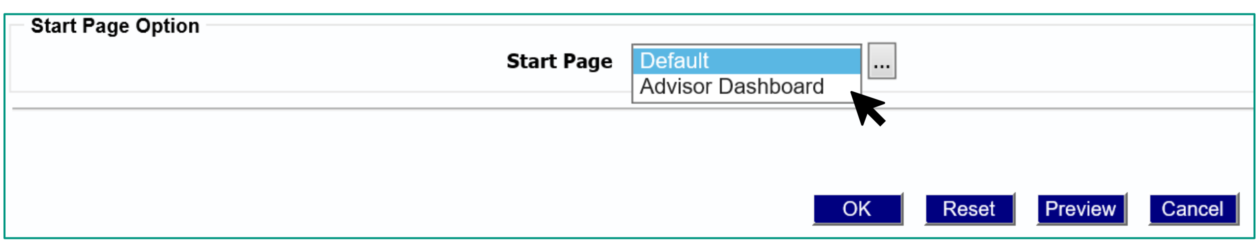
AddVantage Home Page

Set Advisor Dashboard as AddVantage Home Page

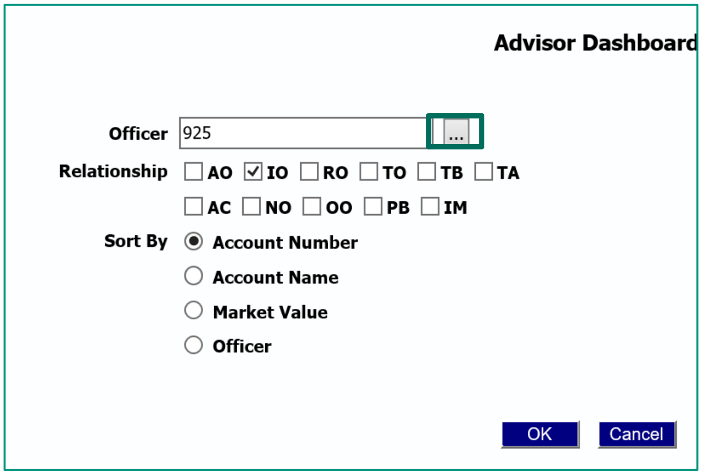
You may set the Advisor Dashboard to be your home page in AddVantage, enabling you to quickly navigate to any accounts. Begin by clicking **Utilities** and then **My AddVantage**, as shown below.

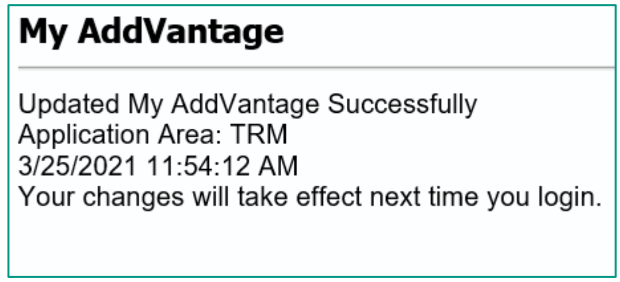


At the bottom of the My AddVantage window is a drop-down menu titled **Start Page**. Click the drop-down menu and select **Advisor Dashboard.**



After selecting **Advisor Dashboard**, click the ellipses (…) icon to the right and enter the **Officer ID** and **Relationship** code of the desired accounts for your AddVantage home page, then click **OK.** After you click **OK**, you will receive a confirmation screen that the change has been processed. Please note, you must restart **AddVantage** and log back in for the change to take effect! Repeat these steps if you need to edit your home page, or if you want to change it back to **Default**.


Advisor Dashboard
Officer
925
...
Relationship
AO
IO
RO
TO
TB
TA
AC
NO
OO
PB
IM
Sort By
Account Number
Account Name
Market Value
Officer
OK
Cancel


My AddVantage
Updated My AddVantage Successfully
Application Area: TRM
3/25/2021 11:54:12 AM
Your changes will take effect next time you login.