Synovus Trust Company introduces Portfolio Online

Enjoy the convenience of online account access with Portfolio Online, the Web-based account access product for Synovus Trust Company, N.A. Your Relationship Manager can provide you with a Getting Started Guide and the login information you need to access account(s) securely on the Internet. There is no fee, it is easy to use and available whenever you want to use it.

Portfolio Online provides real-time access to account information. From obtaining an account update to directing your own trades, Portfolio Online adapts to your needs. It's the one, comprehensive online solution for self-directed investors, third-party investment managers, and traditional trust customers.

Easy To Use

- Streamlined navigation
- Terms and labels you understand
- "Next Step" links that enable you to click and act
- New and expanded views of transaction activity account holdings
- Reports and analysis tools that tie everything together

Comprehensive

- Multiple portfolio holdings views, from simple to expanded views
- Detail and year-to-date summary presentation of transaction information
- Trading, including new trade type controls, account specific mutual fund trading lists, and trades in progress with detailed real-time tracking of purchases and sales
- Cash forecasting to help you with budgeting or investment strategizing
- Statement viewing
- Tools, including planners and calculators, cash forecasting, file transfers, and downloads of information, including direct feeds to Quicken® and Microsoft Money®
- Multi-factor authentication to increase security and reduce risk
- Real-time access or previous-day position viewing

Computer System Requirements

Portfolio Online is compatible with Windows and Macintosh operating systems. Consult the Getting Started Guide for more detail.

Trust services provided by Synovus are offered by Synovus Trust Company, N.A.

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