

Frequently Asked Questions

Trust and Family Office Online

What is the new platform replacing Portfolio Online?

Trust and Family Office Online is your new portal.

Why is the platform changing?

The new platform provides a more intuitive and collaborative view of your account information.

What's new/better about this platform?

You gain several new features:

- Performance reporting – If you receive performance reports today, you will be able to access them in your online account by clicking Documents under the Links menu.
- Estimated income – View estimated income in your Wealth Snapshot.
- Customizable account groupings – If you have multiple accounts, you can set them to your preferences within MyProfile.
- Online communication – You can communicate with your relationship team within the secure platform.

Will I still be able to see my holdings and transaction activity?

Yes, you will still be able to see all your accounts, and in a more succinct view. Your holdings are shown at market value and at current allocations. Transaction activity is available by account.

Will I still be able to view and download statements?

Yes, your statements are available to view and download from the Knowledge Center > Account Statements.

How do I access my account?

Access your account(s) by visiting synovus.com and clicking Trust and Family Office in the secure login box.

Is my ID the same?

Yes, your access ID is the same.

What is my ID?

Please contact your relationship manager, who can look that up for you.

Do I need a new password?

Yes, you will receive your new and unique password in a second letter following this announcement. If you do not receive communications by mail from us, please contact your relationship manager for your password.

Is this platform secure or as secure as the former one?

Yes, the site is secure with multi factor authentication.

The logo for Synovus, featuring the word "SYNOVUS" in a bold, red, serif font with a registered trademark symbol (®) to the upper right of the letter "S".