meridian

NORTHWESTERN MUTUAL
PRIVATE CLIENT GROUP

ACCESS MADE EASY

STEP-BY-STEP INSTRUCTIONS TO SET UP ONLINE ACCESS

BENEFITS OF ONLINE ACCESS

Review your Meridian Financial/Northwestern Mutual insurance and investment details in one spot, pay premiums, set up eDelivery, and connect any external accounts to see your complete financial picture in one place, at any time, on any device.

REGISTRATION NOTE

To register for your online account, **you will need one of your policy/account numbers.** This could be your investment account, insurance policy, annuity contract or insurance service account number. If you need help finding your policy/account number, contact our team at 919-755-3201.

TO CREATE YOUR ONLINE ACCOUNT

1. On MeridianFinancial.NM.com select Client Login and click Log In on the next screen.
2. Select REGISTER to create an account. Have one of your policy or account numbers ready.
3. Enter your username and create/confirm a password and then click NEXT.
4. Confirm the financial representative(s) with whom you wish to compete digital account
5. Choose your account authentication method - six-digit text code or five-digit voice code, or use the Google Authenticator app.
6. Depending on your selection from step 5, retrieve your verification code and select Verify after following the steps on screen.
7. This will complete your registration and you can begin to use the Northwestern Mutual consumer website.

GO PAPERLESS

Sign up for eDelivery and as soon as your eligible documents are available, we'll notify you immediately so you can view them whenever you want, on any device. It's simple and secure.

1. Go to the menu in the top right corner with your name on it. Select the **Settings** tab.
2. Select **Preferences** from the options on the left.
3. Select eDelivery for the product categories that you would like to go paperless.

NOTE: You can update your eDelivery preferences at any time.

NORTHWESTERN MUTUAL APP

1. Download the Northwestern Mutual app in either the App Store or Google Play Store from your device.
2. Enter Northwestern Mutual as your search query.
3. Tap the name, then Install or Get to download.
4. Use your information when you created to log into the app to have your account information on you no matter where you are!

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CONNECT OTHER ACCOUNTS

Link your banking and investment accounts, credit cards, loans and mortgages, and property values to create a complete financial picture and track transactions and spending in a single location.

1. In the Accounts tab of your online account, select Connect Account and then choose your financial institution from the list or enter the name in the search bar.
2. Enter your login credentials for that account and click Connect Account.
3. If you can't find your financial institution, use the Add a Manual Account option.
   *NOTE: Manual accounts values are not automatically updated.

ONCE YOU ADD AN ACCOUNT

- See your aggregated accounts grouped by account type. Select individual accounts for further review.
- Review and categorize transactions. Sort and filter transactions by date or category.
- Choose accounts and transactions to exclude from your Net Worth and Spending Summary.
- Accounts and Properties can be aggregated by selecting Add Another Account.

SHARING INFORMATION

Let people associated with your products view policy and account information.

1. Go to the menu in the top right corner with your name on it. Select the Settings tab then choose Information Sharing from the options on the left.
2. Select the individual(s) and product(s) to share, and then click Approve Changes.

*NOTE: Information Sharing must be completed by the product owner. Product owners can share information with individuals who make policy payments or are the insured on the products, along with a few other specialized roles.

ADDITIONAL SELF-SERVICE FEATURES

Use the consumer website for other self-service functionality.

- Manage your billing account
  - Make payments
  - Manage payment methods
  - Change payment frequency
  - View payment history
  - Make third-party contributions
- Manage loan repayments
- Make one-time deposits to your brokerage/advisory accounts or contribute to your IRA
- Modify your scheduled annuity contributions; make one-time contributions
- Initiate and manage disability insurance claims
- Complete online medical history questionnaire
- Track application status through underwriting
- Change beneficiaries on insurance products*