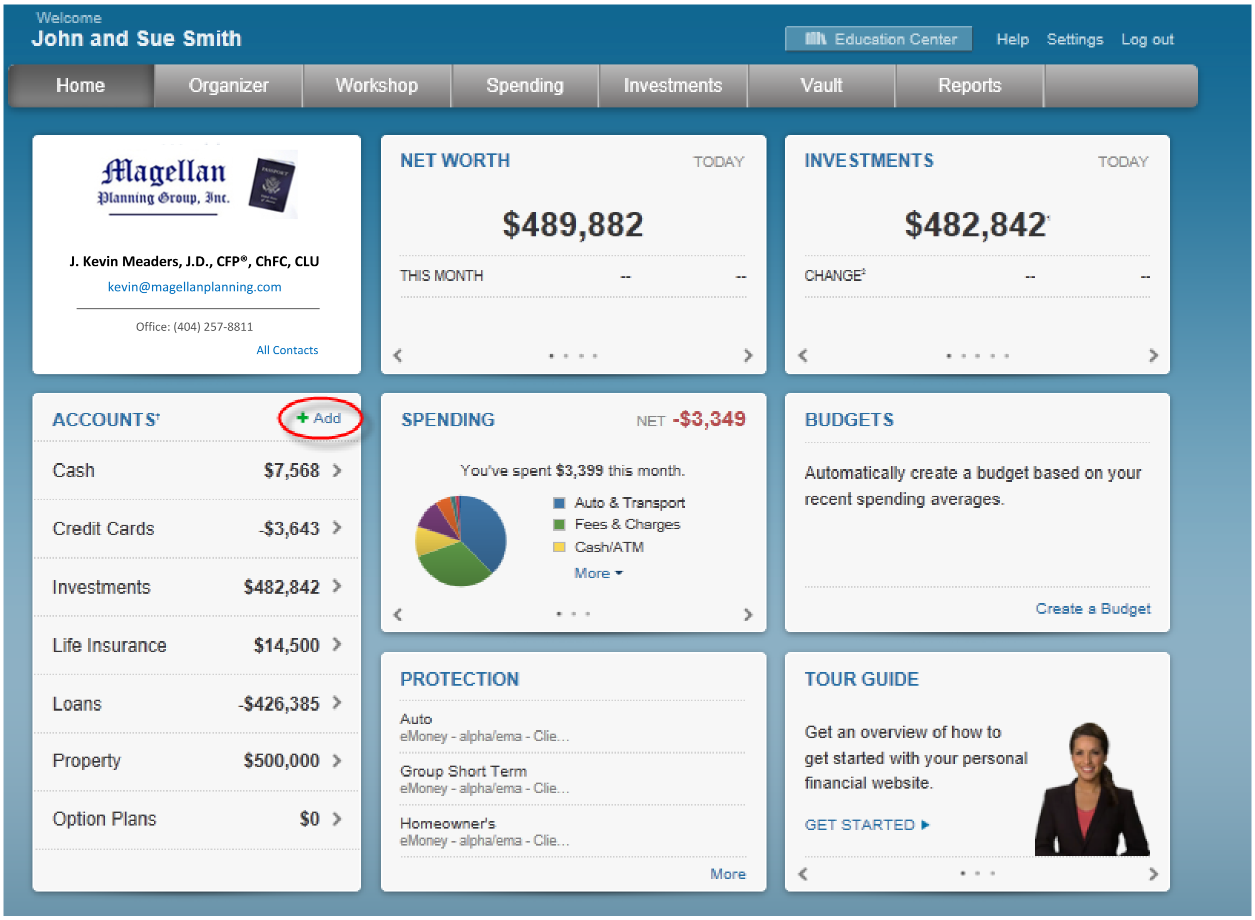
Magellan
Planning Group, Inc.

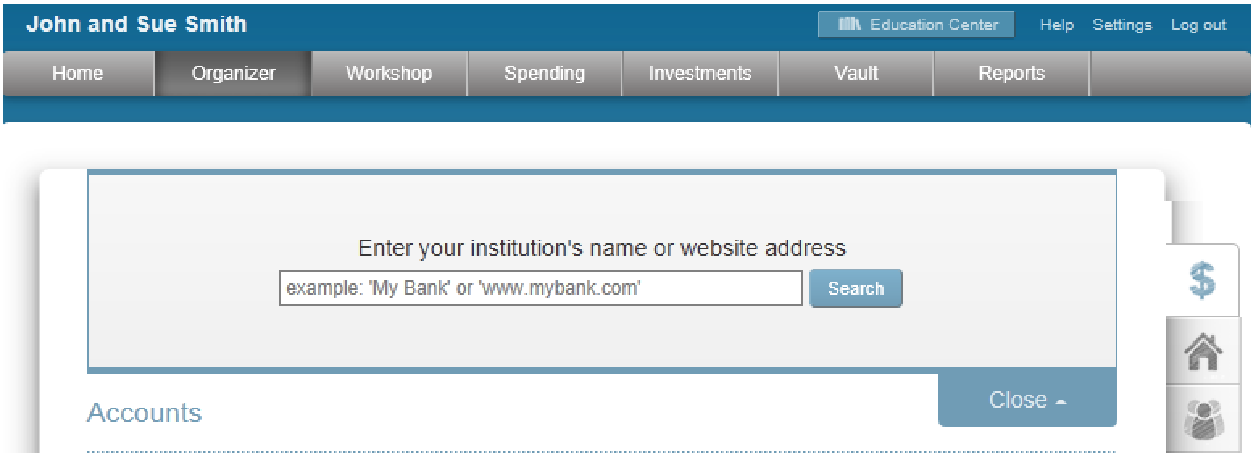
Client Connections Booklet

This booklet is designed to assist with setting up connections in your **PASSport** website.

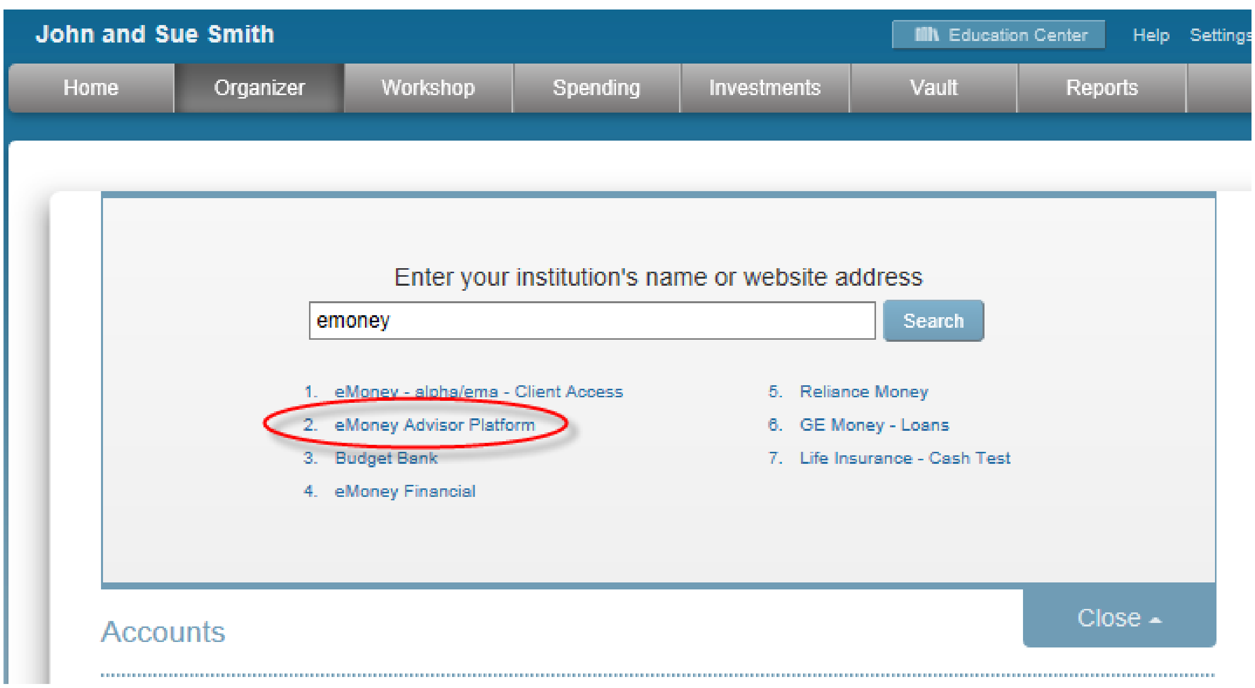
1. Click on **Add** in the **Accounts** section under the **Home** page.



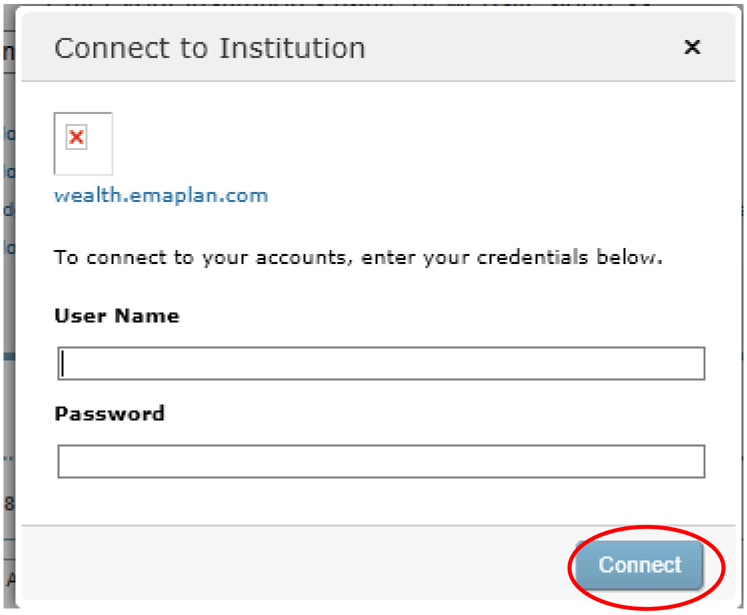
2. Enter in your institution and click **Search**.



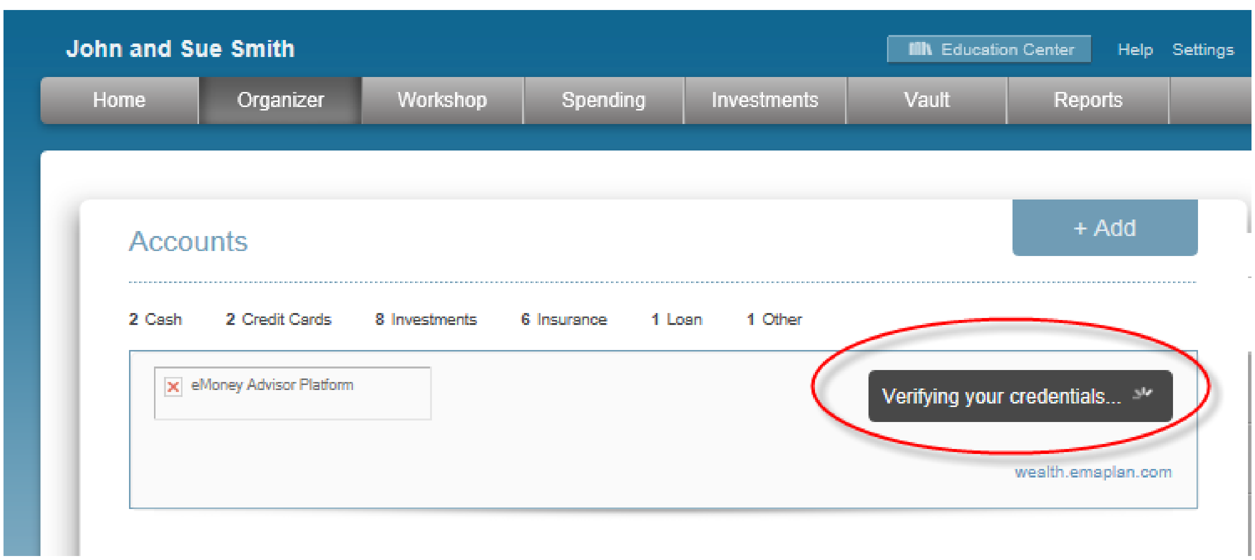
3. From the list, select your institution.



4. Enter your **credentials** and click **Connect**.



NOTE: The system will take a moment to verify and retrieve your information.



5. The account values are pulled through onto the accounts page.

Blue Credit Card	Loan - Credit Card	01/31/2013 10:27AM	-$2,368
Disability Policy	Disability Policy - Group Short Term	01/31/2013 10:27AM	$0
† Easy 123 Checking	Cash Equivalent - Checking	01/31/2013 10:27AM	$4,568
† Electric Orange	Cash Equivalent - Checking	01/31/2013 10:27AM	$3,000
† Fidelity 401(k)	Qualified Retirement - Traditional...	01/31/2013 10:27AM	$40,249
† Fidelity Brokerage	Taxable Investment	01/31/2013 10:27AM	$62,684

6. To maintain the connection, see options in the upper right corner.