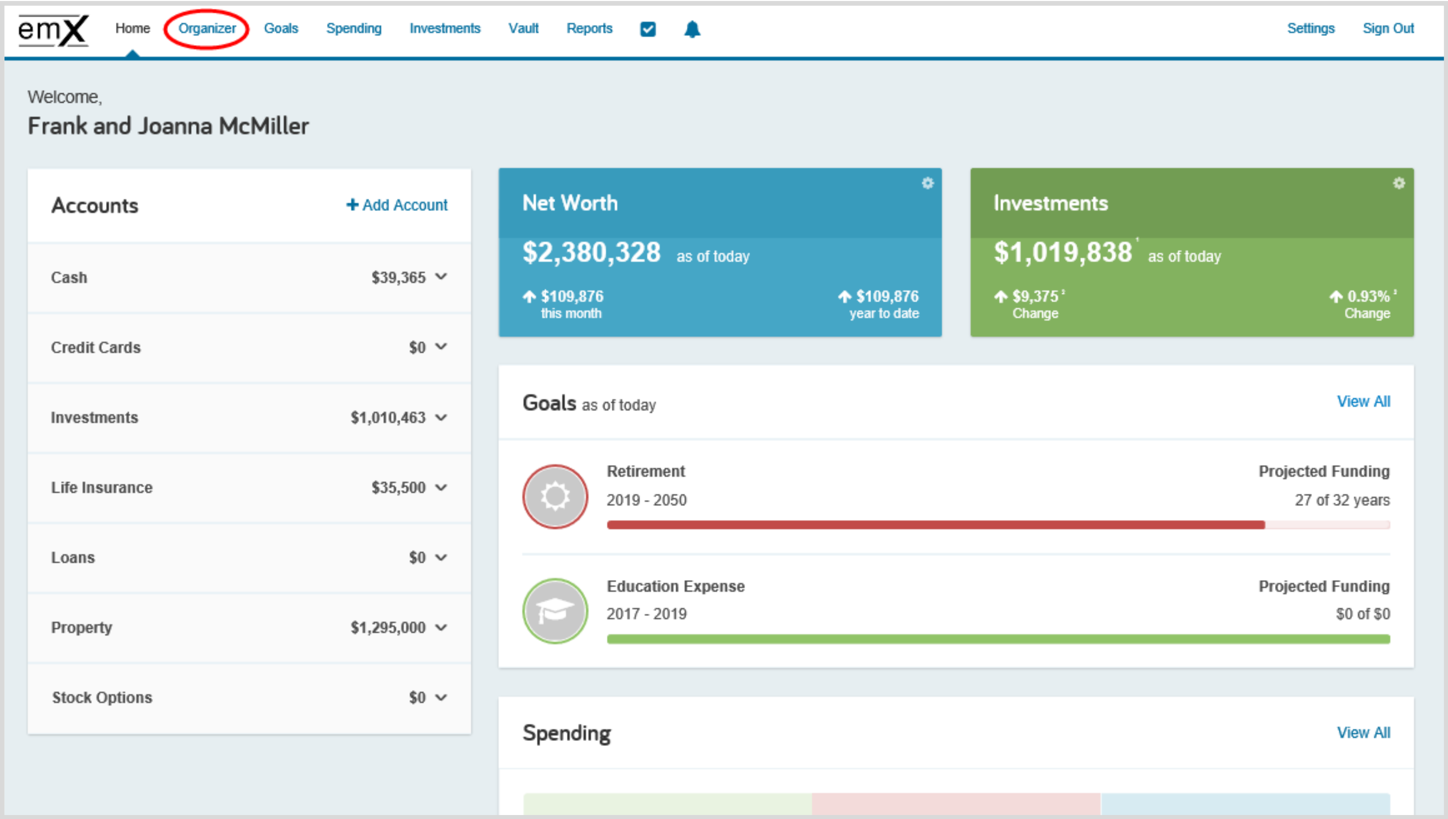
Add Accounts

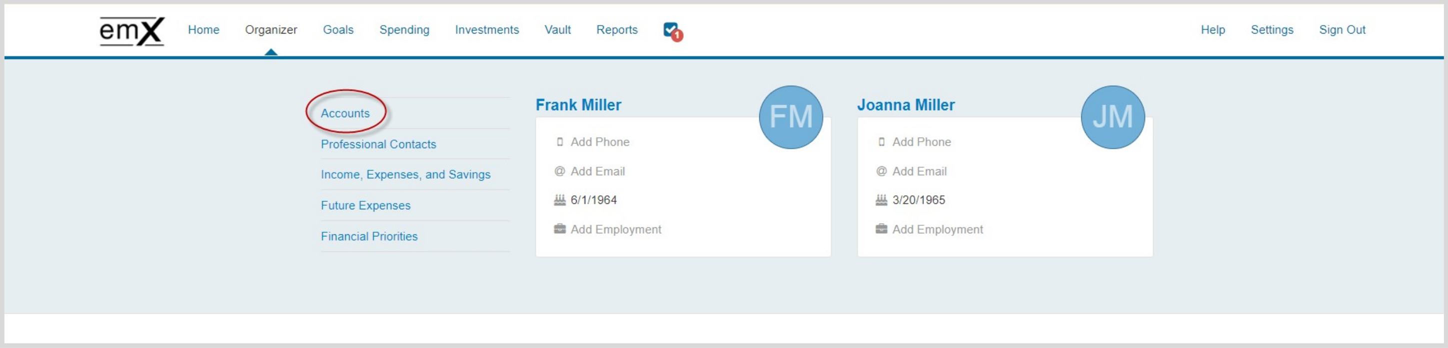
In this userguide, we will demonstrate how to establish a connection with your personal banking institutions. A connection is a direct link with an institution that feeds over updated account information.

1. From your home page, click **Organizer**.



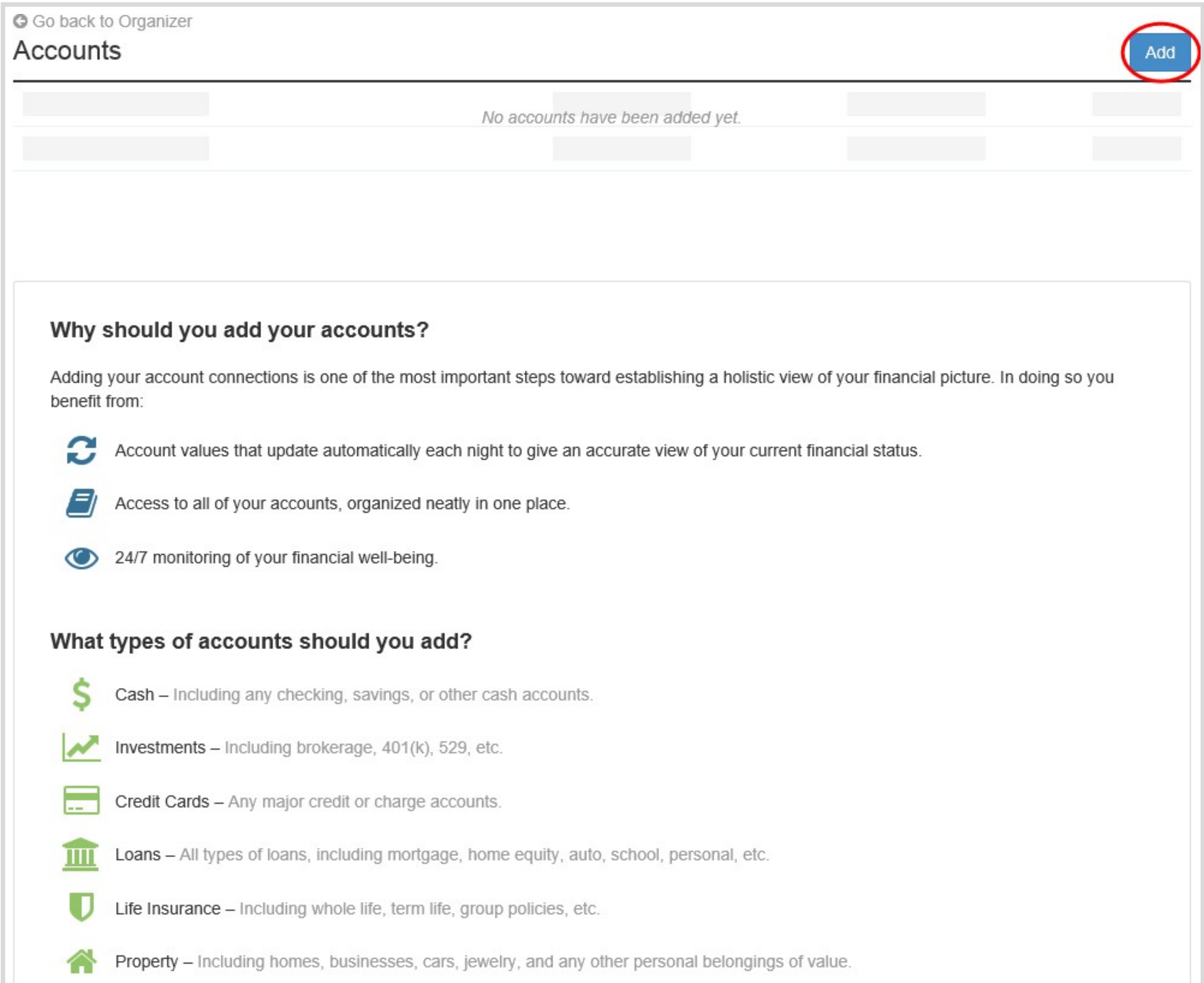
You can also click the **+Add Account** link directly from the Home page!

2. Click **Accounts**.



Add Accounts

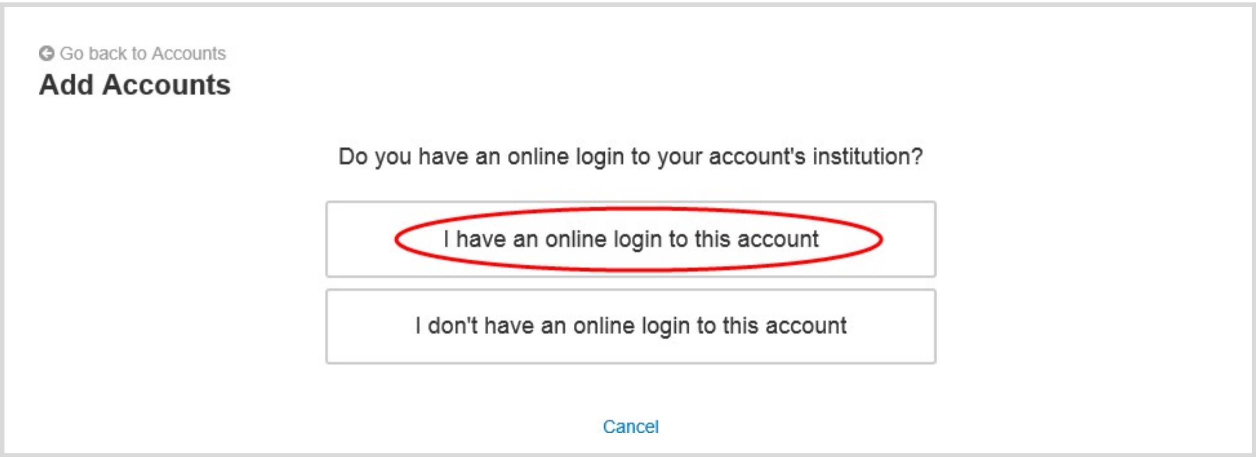
3. Review the information on why you should add accounts, and what type of accounts you should add. Click **Add**.



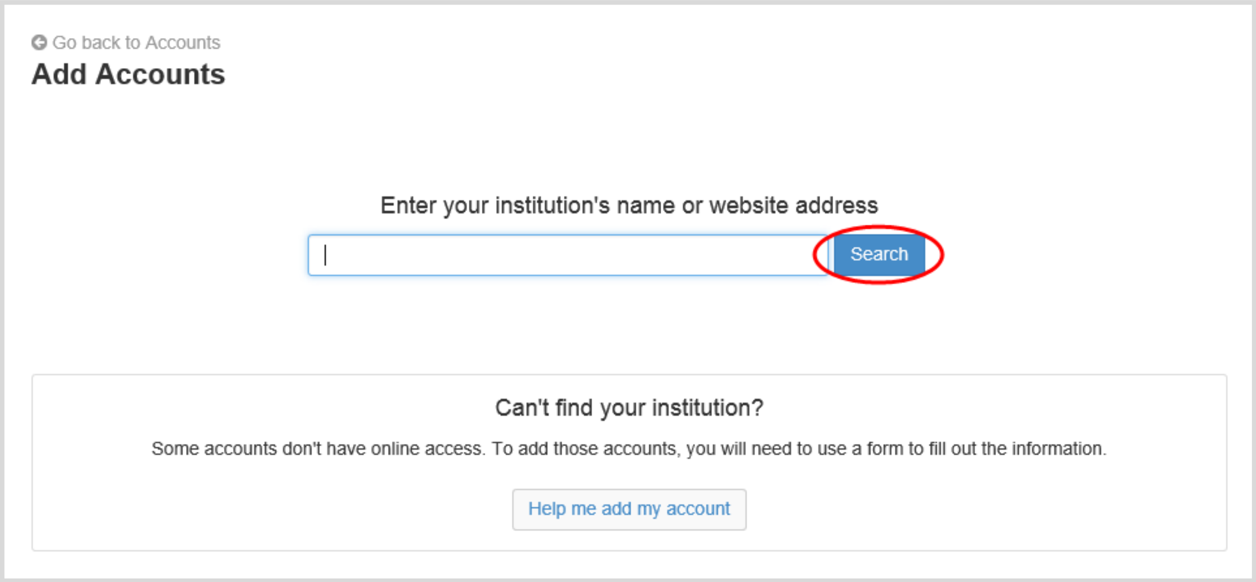
Add Accounts

4. Select whether or not you have an online login for this account.

Please Note: If you do not have an online login for this account, the site will help you add the accounts manually.

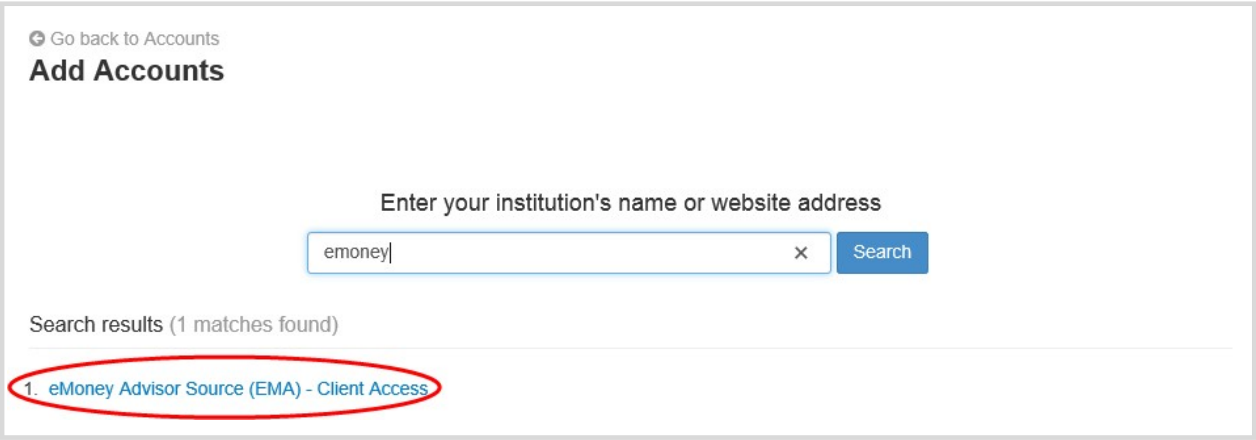


5. Enter the institution's name or website address and click **Search**.

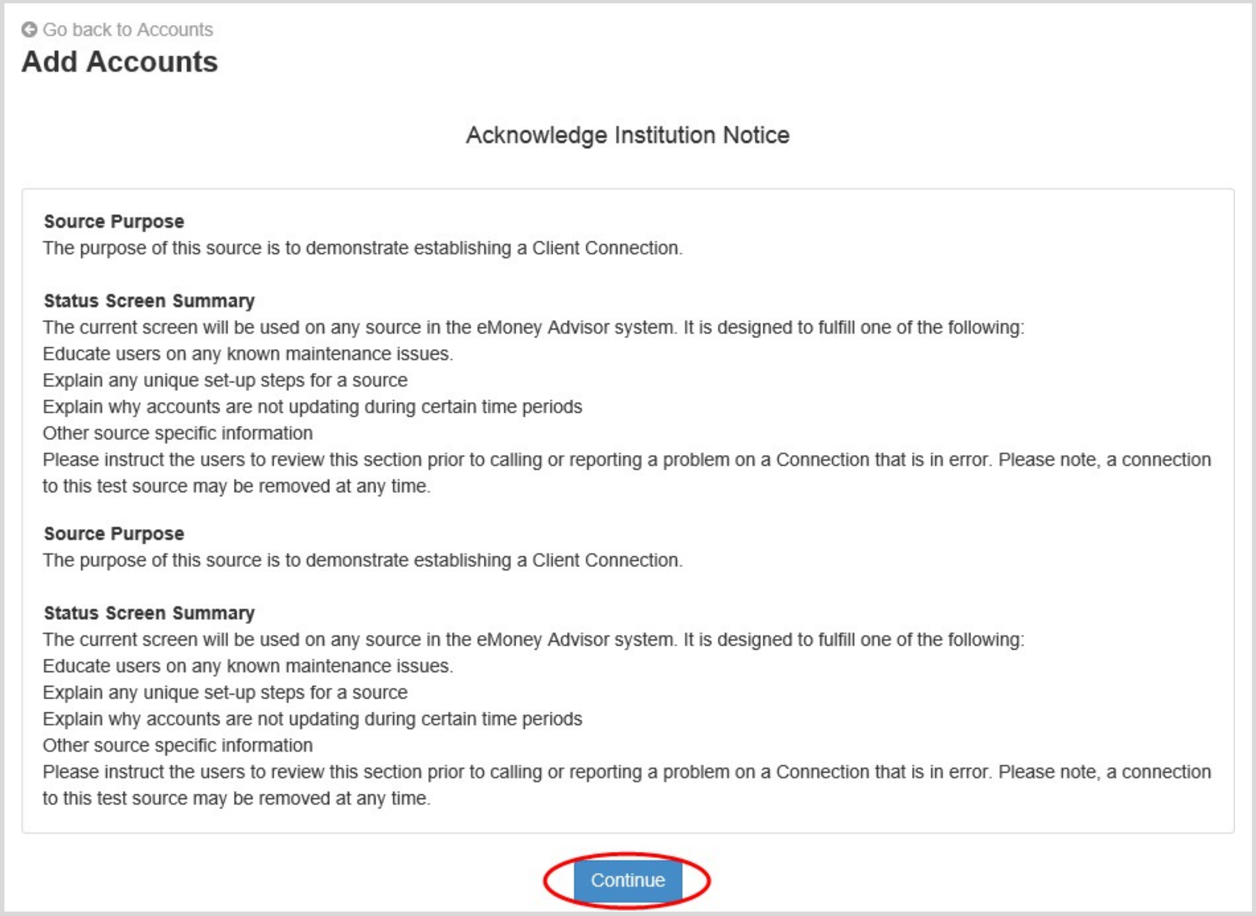


Add Accounts

6. From the search results found, select the appropriate link.

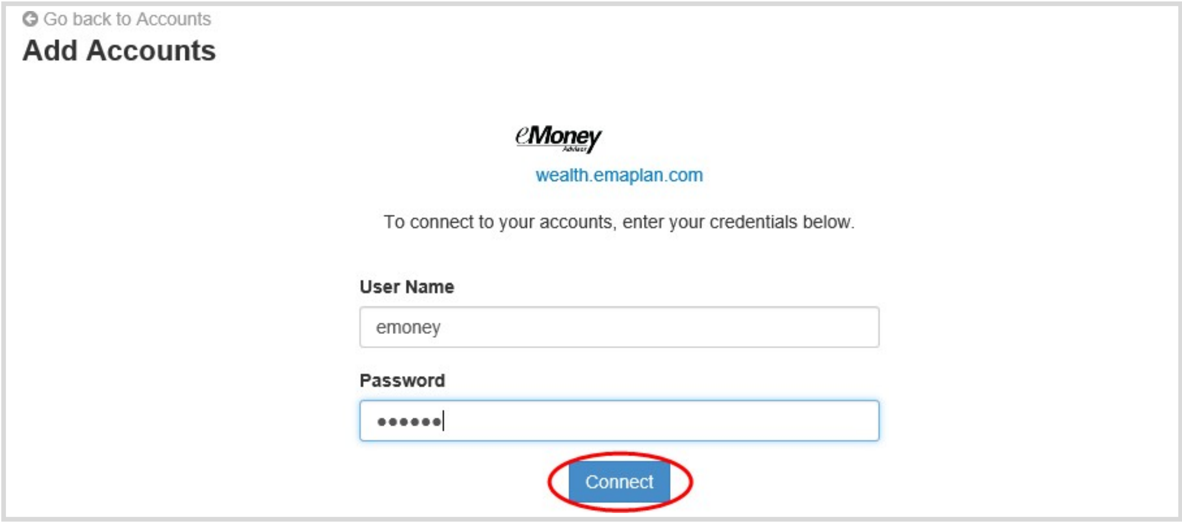


7. Next you will acknowledge the institution notice where applicable. This notice will inform you of any important information relating to this institution's connection. Click **Continue.**

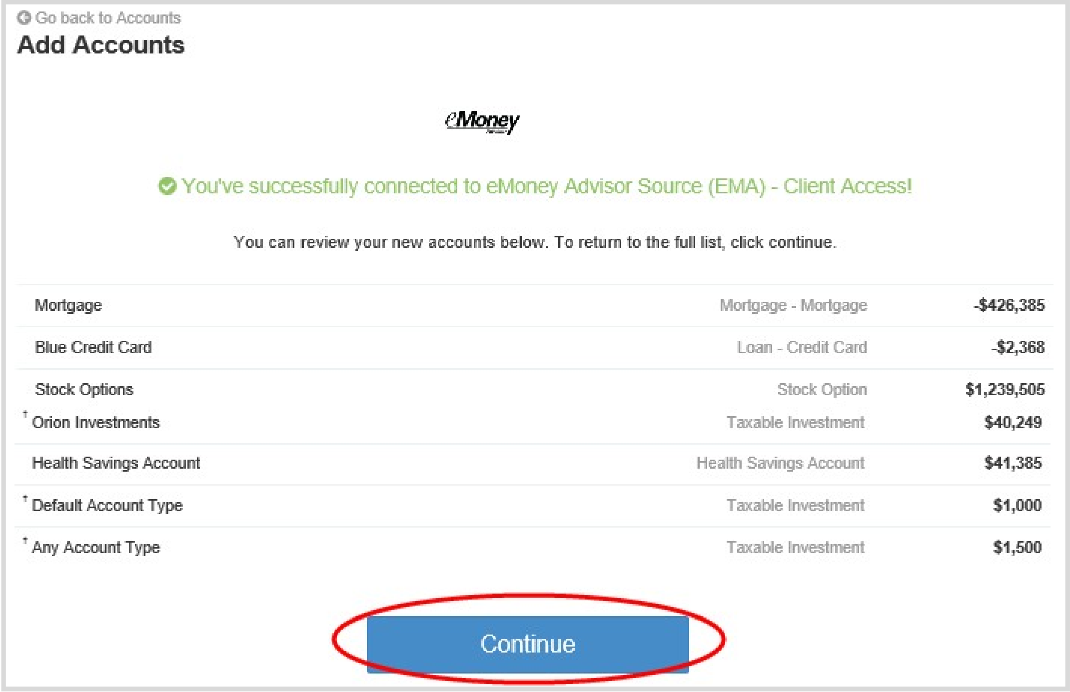


Add Accounts

8. Enter in your login credentials for this institution and click **Connect**. If there's an issue connecting to your accounts, you'll receive a status message describing the problem. Click on the message to learn how to fix it.

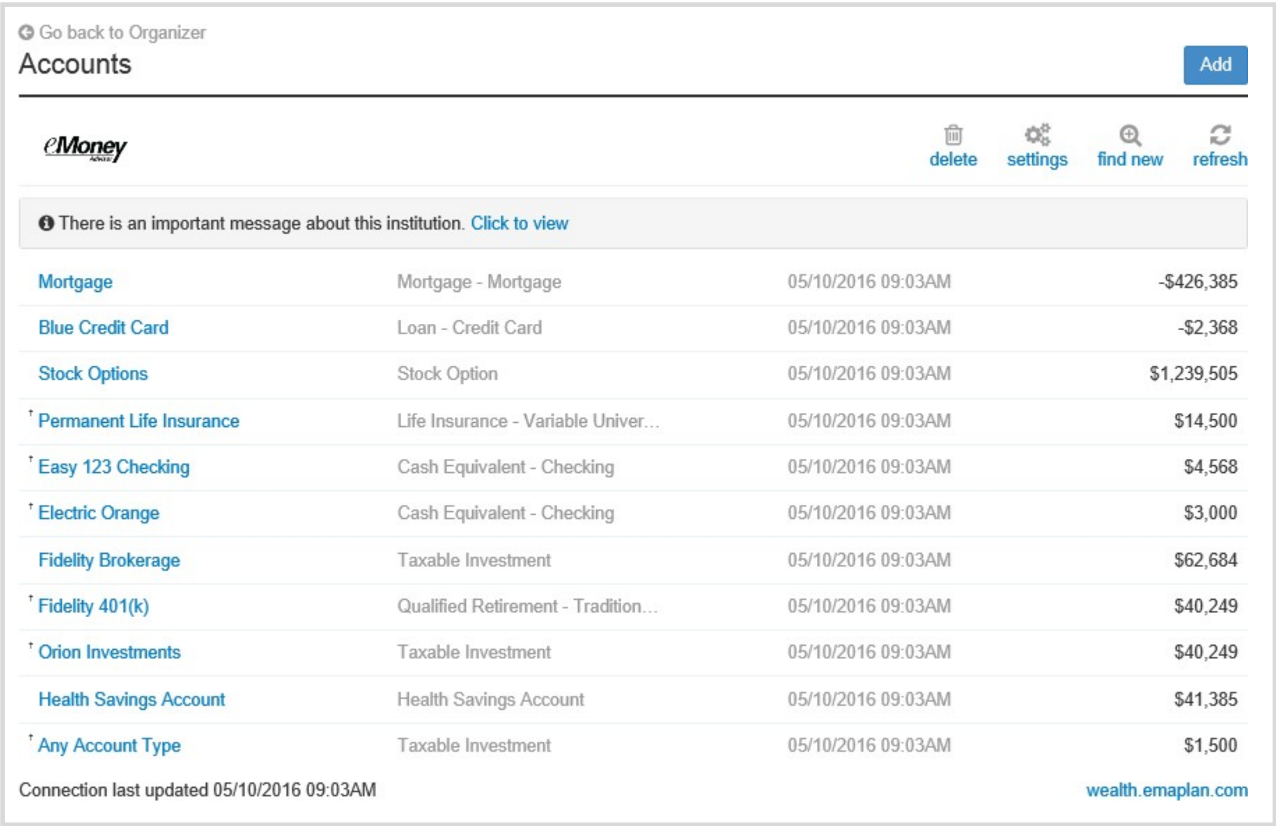


9. Once your credentials have been verified you can review the accounts brought over through the connection. Click **Continue** to return to an overview of all accounts you have entered into your portal.



Add Accounts

10. On the Accounts page you can easily see when your accounts with an institution last updated or if any accounts are in an errored state.



Go back to Organizer

Accounts

Add

eMoney

delete settings find new refresh

There is an important message about this institution. Click to view

Mortgage	Mortgage - Mortgage	05/10/2016 09:03AM	-$426,385
Blue Credit Card	Loan - Credit Card	05/10/2016 09:03AM	-$2,368
Stock Options	Stock Option	05/10/2016 09:03AM	$1,239,505
† Permanent Life Insurance	Life Insurance - Variable Univer...	05/10/2016 09:03AM	$14,500
† Easy 123 Checking	Cash Equivalent - Checking	05/10/2016 09:03AM	$4,568
† Electric Orange	Cash Equivalent - Checking	05/10/2016 09:03AM	$3,000
Fidelity Brokerage	Taxable Investment	05/10/2016 09:03AM	$62,684
† Fidelity 401(k)	Qualified Retirement - Tradition...	05/10/2016 09:03AM	$40,249
† Orion Investments	Taxable Investment	05/10/2016 09:03AM	$40,249
Health Savings Account	Health Savings Account	05/10/2016 09:03AM	$41,385
† Any Account Type	Taxable Investment	05/10/2016 09:03AM	$1,500

Connection last updated 05/10/2016 09:03AM

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11. Each connection you establish will have its own specific maintenance required. For example, if you updated your password on the institution you will need to then update the credentials in your portal.

You can **Delete** the connection, **change your settings, find new accounts**, and **refresh** the connection at any time to pull over updated account values.

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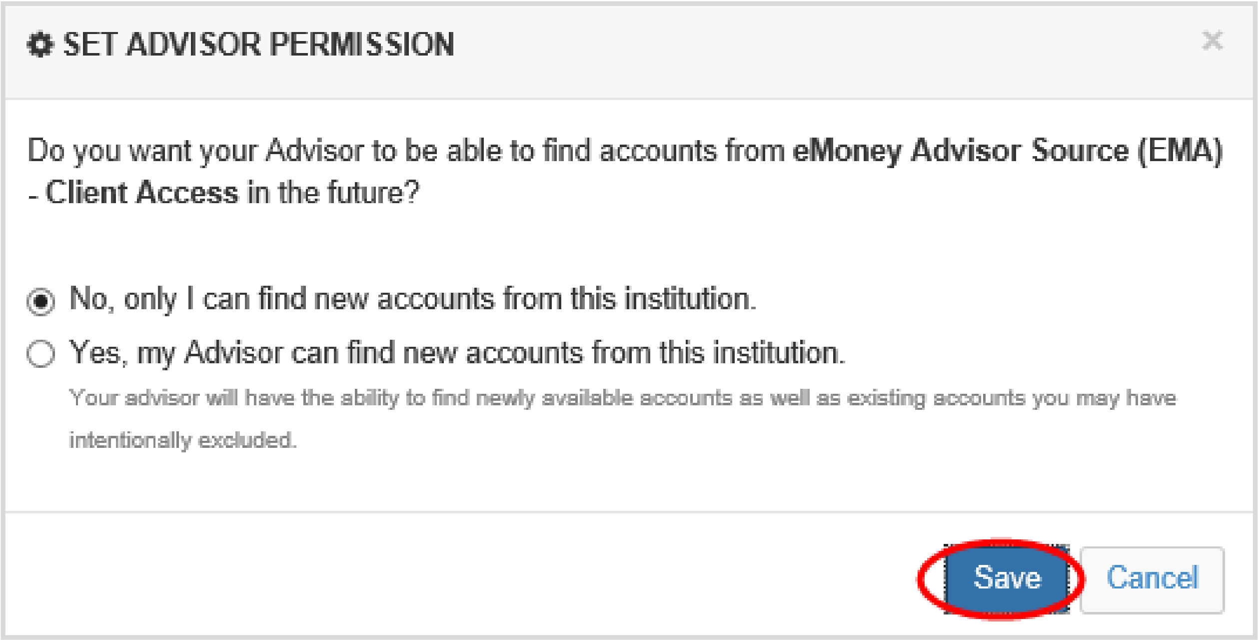
12. The settings link gives you the option to enable your Advisor to find new accounts on your behalf.

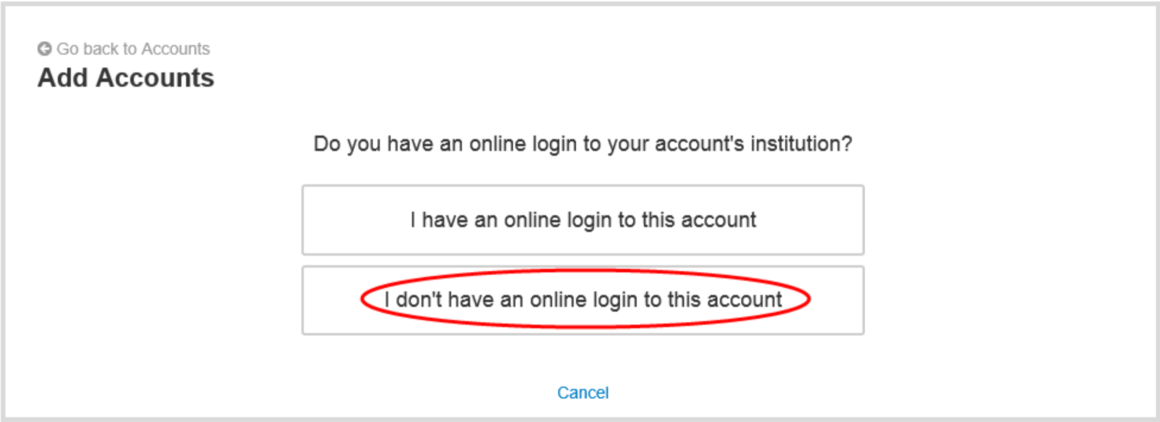


Add Accounts

If you do **not** have an online login to an institution, follow the below steps to enter accounts in manually. While manual accounts do NOT update, they help build a better financial snap shot for both you and your advisor.

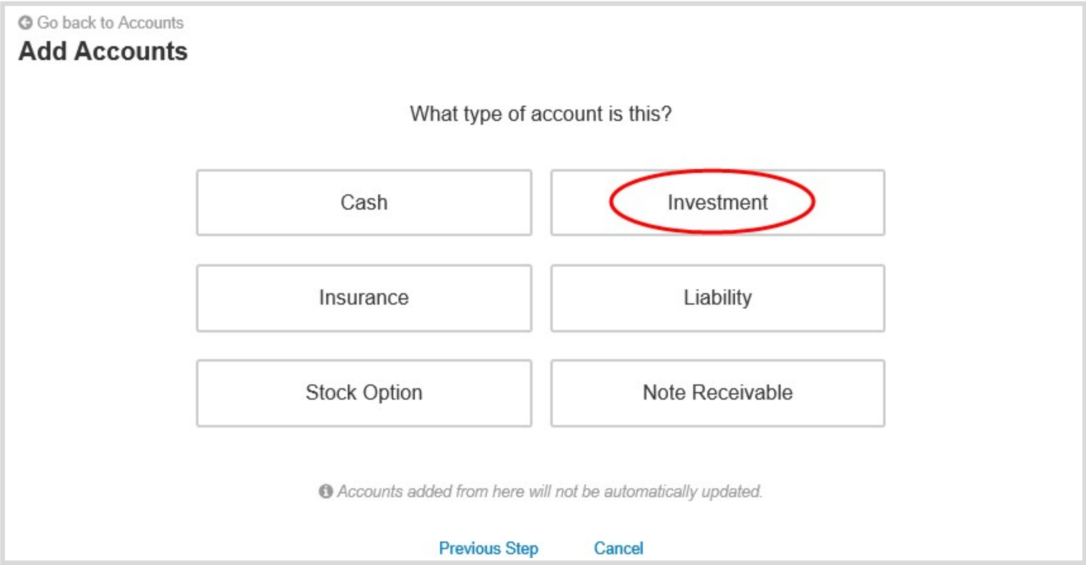
1. Click **Add** on the Accounts page.

2. Select "I don't have an online login to this account."



3. Select the type of account.

Add Accounts



Add Accounts

4. Enter details about the account and click **Save**!