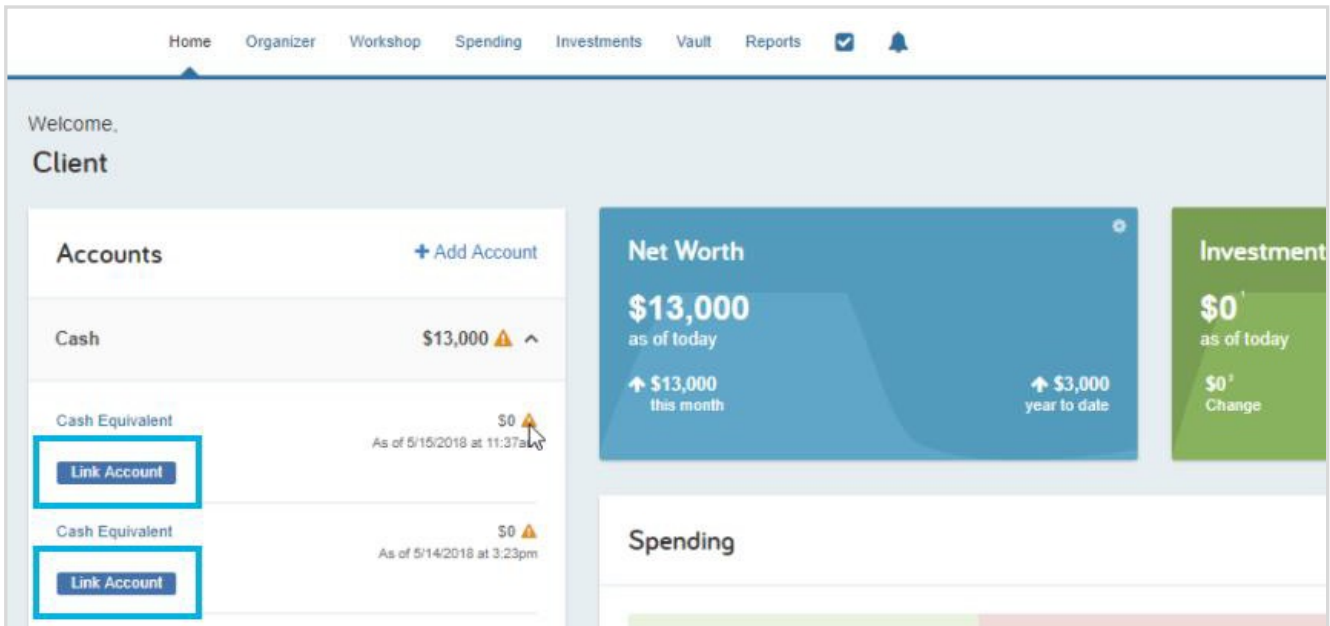


Link Manually Entered Accounts

This training guide demonstrates how to connect your manually entered facts into your *Wealth Management System*. A simple process you will go through on an account basis, this guide will help you every step of the way. There are many benefits to connecting your accounts, most importantly you will have up-to-date access to account balances and information!

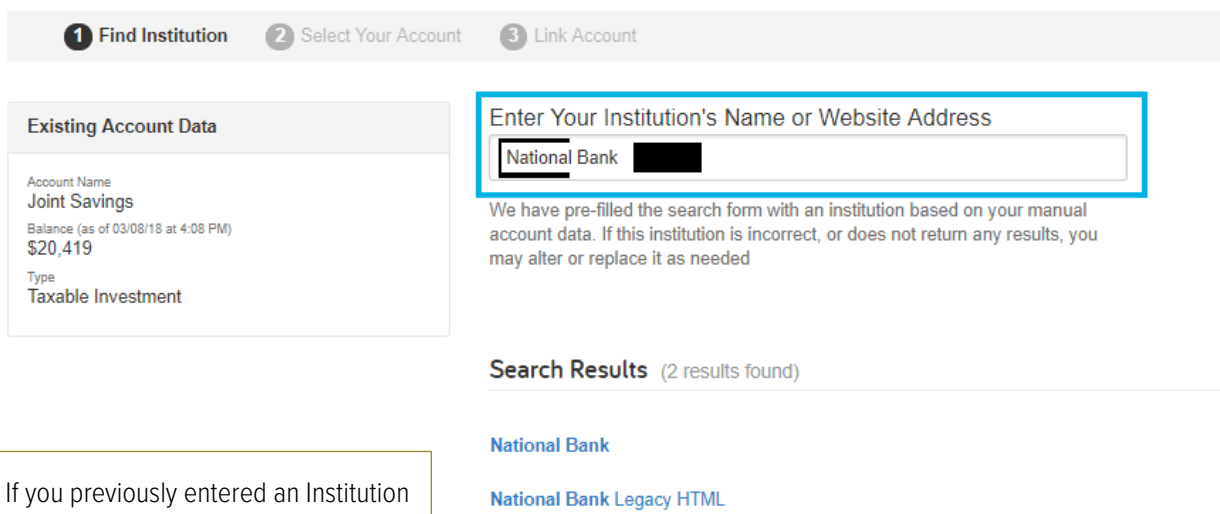
To begin, log in to your *Wealth Management System*.

1. From your Home page, scroll to the **Accounts** tile. If you see a section with a yellow notification icon, click to expand. Any manually entered facts will have a **Link Account** button to begin the workflow!



2. After clicking Link Account, you will then be prompted to search for and identify the appropriate financial institution related to that specific account. Search for **Name** or **Website Address**.

Connect Account



Note: If you previously entered an Institution Name within your organizer for an account, the application will pre-populate search results based on what you entered!

Link Manually Entered Accounts

- After selecting the right institution, you will enter your credentials to establish the connection. The institution may prompt for additional verification such as security questions or 2-Factor Authentication.

Connect Account

1 Find Institution
2 Select Your Account
3 Link Account

Existing Account Data

Account Name
Joint Savings

Balance (as of 03/09/16 at 4:03 PM)
\$20,419

Type
Taxable Investment

Enter Credentials

User Name

Password

Add a Nickname (optional)

Previous

Connect

- Once the link is established, you will see a list of accounts that you can link to your site. Select the account that matches and click **Continue**.

Connect Account

✔ Find Institution
2 Select Your Account
3 Link Account

Existing Account Data

Account Name
Joint Savings

Balance (as of 03/09/16 at 4:03 PM)
\$20,419

Type
Taxable Investment

Select Account

You've successfully connected to **eMoney National Bank**. Please select the account below that best matches your existing account to continue.

	Account	Type	Balance	
<input type="radio"/>	Business Checking (****9837)	Taxable Investment	\$2,214	May 10, 2015 11:14 AM
<input type="radio"/>	Joint Checking (****7591)	Taxable Investment	\$474	May 10, 2015 11:14 AM
<input type="radio"/>	Joint Savings (****5416)	Taxable Investment	\$20,419	May 10, 2015 11:14 AM
<input type="radio"/>	Personal Cheq	Taxable Investment	\$1,766	May 10, 2015 11:14 AM
<input type="radio"/>	Retirement Sa	Taxable Investment	\$10,745	May 10, 2015 11:14 AM

Have another online login to eMoney National Bank? Add another eMoney National Bank login now.

Previous

Continue

Link Manually Entered Accounts

5. Finally, if there are any remaining manual accounts to connect you will be prompted to select another account and begin the Connect Account workflow.

Connect Account

Find Institution Select Your Account Link Account

Your account is now connected.
You have 2 accounts left requiring connection. Select one below to continue.

Account	Type	Institution	Balance
<input type="radio"/> Personal Checking	Taxable Investment	eMoney National Bank	\$1,766 03/08/18 at 4:08 PM
<input type="radio"/> Retirement Savings	Taxable Investment	eMoney National Bank	\$10,745 03/08/18 at 4:08 PM

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