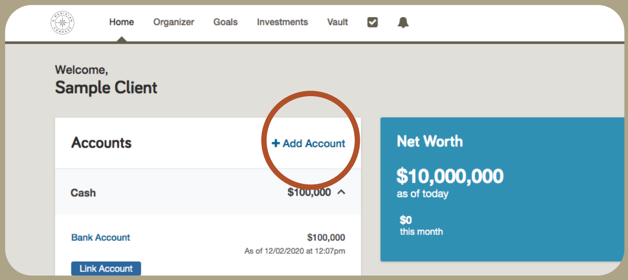
How to Add Your Accounts

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.

Step 1

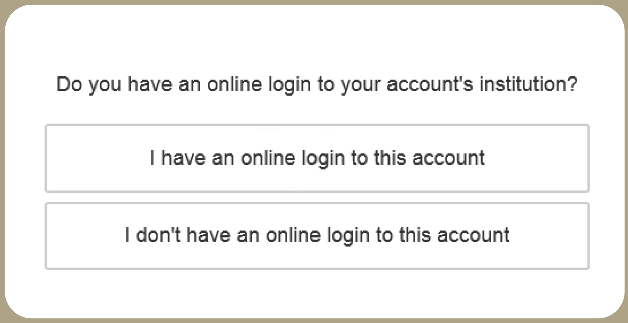
From the home page, click on +Add Account.



Step 2

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

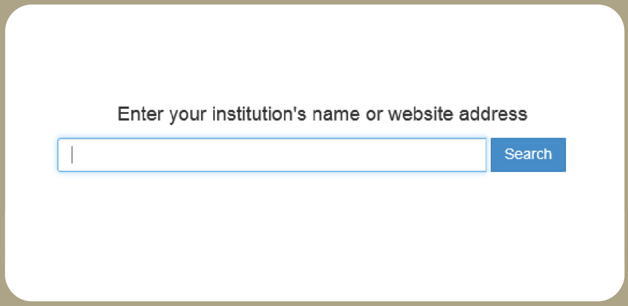
Please Note: If you do not have an online login for this account, the application will help you add the accounts manually.



Step 3

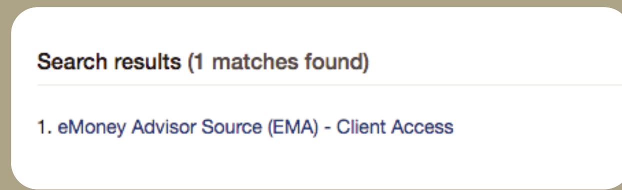
Enter the institution's name or website address and click Search.

If trying to add an account and it's not found, click on the "Help me add my account" link.



Step 4

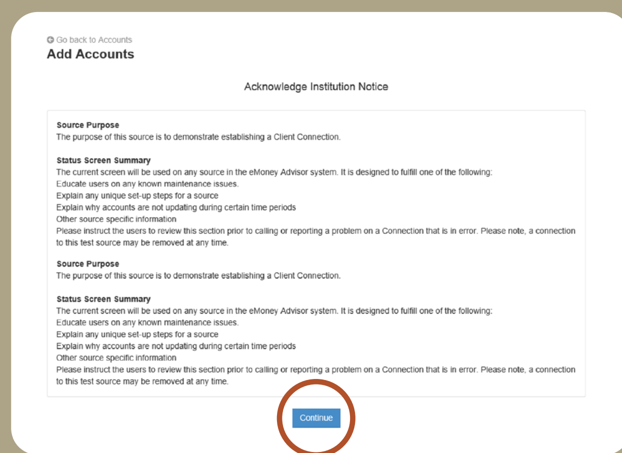
From the search results, select the appropriate link.



Multiple results will populate and are automatically sorted by most popular. Select the closest to your institution. You may also click on the link which will direct you to the website for you to review accuracy.
Still unable to you find your institution? To add those accounts, follow the instructions **here** to add your accounts manually.

Step 5

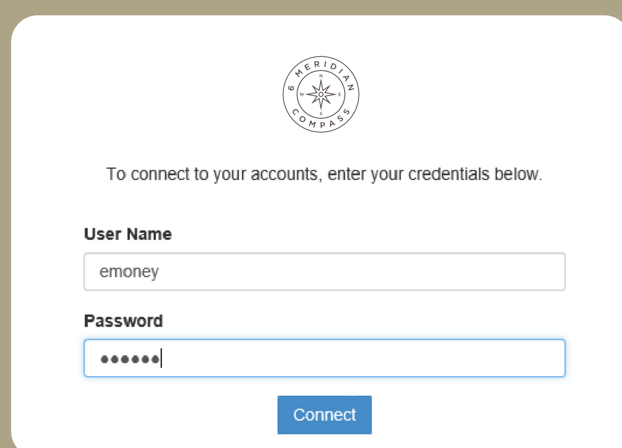
Click Continue.



You will acknowledge the institution notice where applicable. This notice will inform you of any important information relating to this institution's connection.

Step 6

Enter your login credentials for this institution and click Connect.

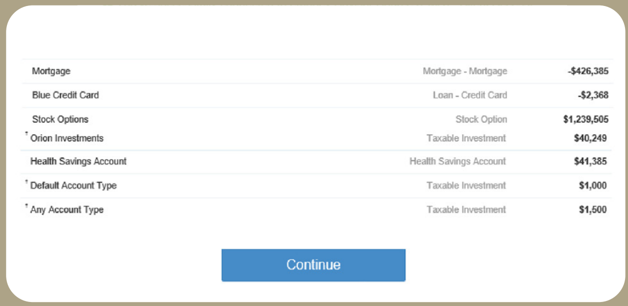


If there's an issue connecting to your accounts, you'll receive a status message describing the problem. Click on the message to learn how to fix it.

Step 7

Click Continue to return to an overview of all accounts you've entered into your portal.

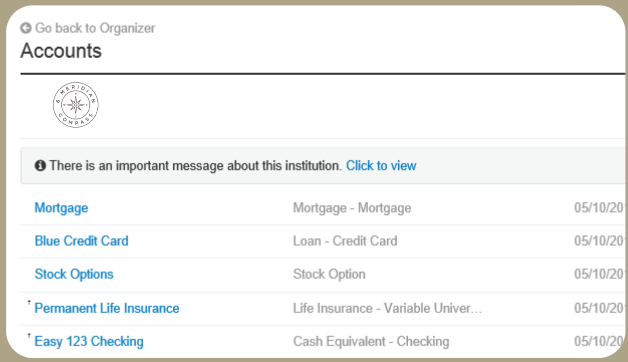
Once your credentials have been verified you can review the accounts brought over through the connection.



Step 8

Review your accounts page.

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.



Step 9

Check your accounts.

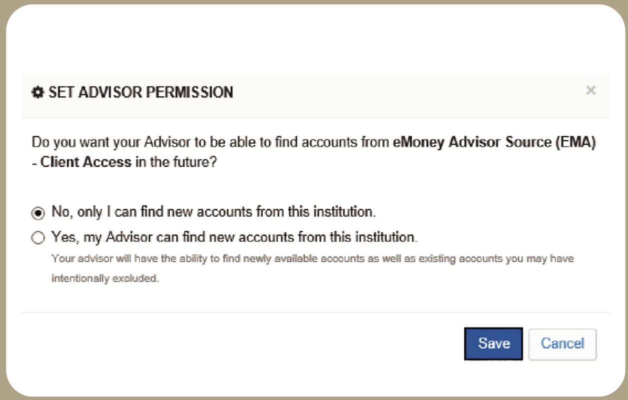
Each connection you establish will have its own specific maintenance required. For example, if you updated your password on the institution you will need to then update the credentials in your portal.

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

Step 10

Check the Settings link.

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

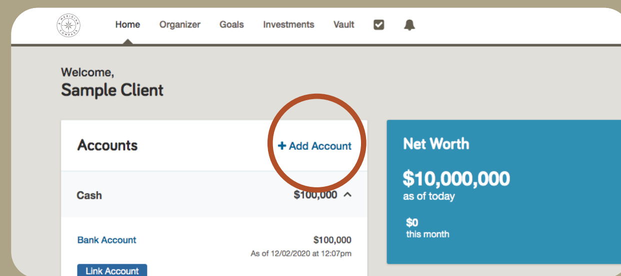


Adding Accounts *Manually*

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

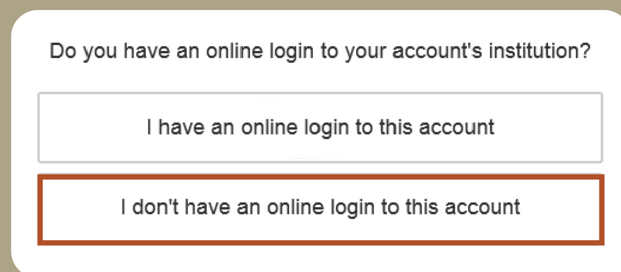
Step 1

From the home page, click on **+Add Account.**



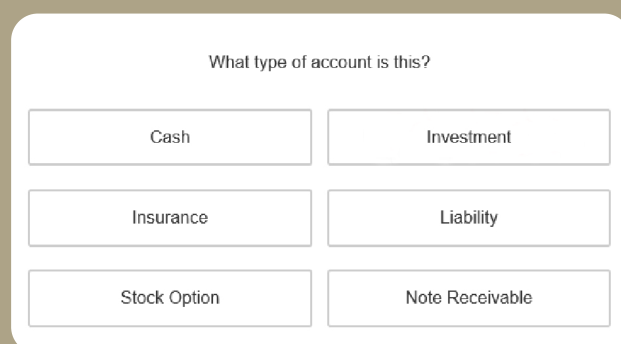
Step 2

Select “I don’t have an online login to this account.”



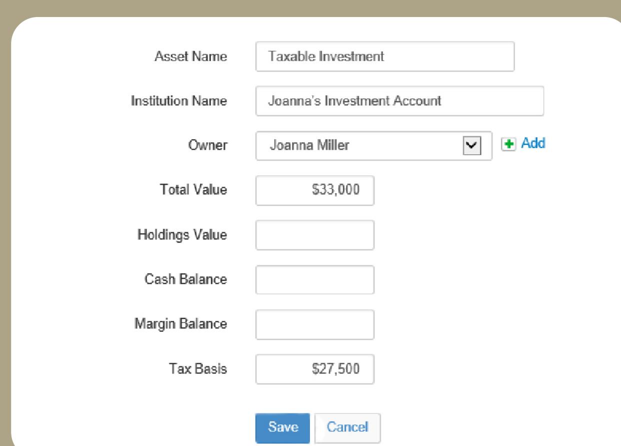
Step 3

Select the type of account.



Step 4

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



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