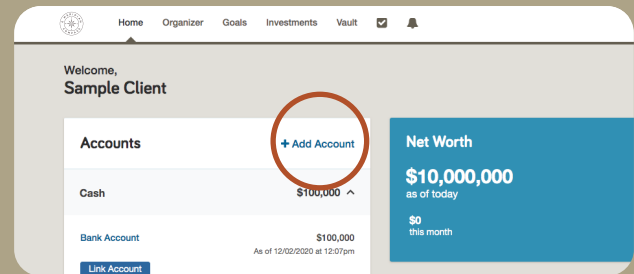


# How to Add Your Accounts

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.

Do you have an online login to your account's institution?

I have an online login to this account

I don't have an online login to this account

## 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.

Enter your institution's name or website address

Search



## 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.

### Search results (1 matches found)

1. eMoney Advisor Source (EMA) - Client Access

[Go back to Accounts](#)  
**Add Accounts**

#### Acknowledge Institution Notice

**Source Purpose**

The purpose of this source is to demonstrate establishing a Client Connection.

**Status Screen Summary**

The current screen will be used on any source in the eMoney Advisor system. It is designed to fulfill one of the following:

Educate users on any known maintenance issues.

Explain any unique set-up steps for a source

Explain why accounts are not updating during certain time periods

Other source specific information

Please instruct the users to review this section prior to calling or reporting a problem on a Connection that is in error. Please note, a connection to this test source may be removed at any time.

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Continue



To connect to your accounts, enter your credentials below.

**User Name**

emoney

**Password**

•••••

Connect



## 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.

Mortgage	Mortgage - Mortgage	-\$426,385
Blue Credit Card	Loan - Credit Card	-\$2,368
Stock Options	Stock Option	\$1,239,606
* Orion Investments	Taxable Investment	\$40,249
Health Savings Account	Health Savings Account	\$41,385
* Default Account Type	Taxable Investment	\$1,000
* Any Account Type	Taxable Investment	\$1,500

[Continue](#)


## 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.

[Go back to Organizer](#)

### Accounts



**i** There is an important message about this institution. [Click to view](#)

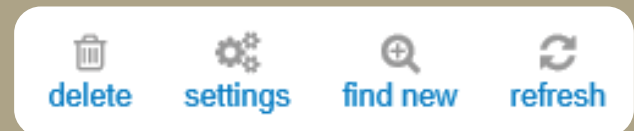
<a href="#">Mortgage</a>	Mortgage - Mortgage	05/10/20
<a href="#">Blue Credit Card</a>	Loan - Credit Card	05/10/20
<a href="#">Stock Options</a>	Stock Option	05/10/20
* <a href="#">Permanent Life Insurance</a>	Life Insurance - Variable Univer...	05/10/20
* <a href="#">Easy 123 Checking</a>	Cash Equivalent - Checking	05/10/20

## 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.

**SET ADVISOR PERMISSION** ×

Do you want your Advisor to be able to find accounts from **eMoney Advisor Source (EMA) - Client Access** in the future?

No, only I can find new accounts from this institution.

Yes, my Advisor can find new accounts from this institution.

Your advisor will have the ability to find newly available accounts as well as existing accounts you may have intentionally excluded.

[Save](#) [Cancel](#)

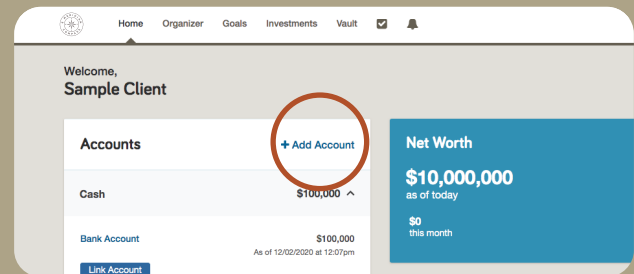


# Adding Accounts *Manually*

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."

Do you have an online login to your account's institution?

I have an online login to this account

I don't have an online login to this account

## Step 3

Select the type of account.

What type of account is this?

Cash

Investment

Insurance

Liability

Stock Option

Note Receivable

## Step 4

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

Asset Name

Institution Name

Owner

Total Value

Holdings Value

Cash Balance

Margin Balance

Tax Basis





W W W . 6 M E R I D I A N . C O M

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