



6 MERIDIAN

COMPASS

Adding an Account



Add Account

This user guide will demonstrate how to add connected and manual accounts.

Adding Connected Accounts

Establishing connections to your personal banking institutions will allow your account information to be updated automatically. If you do not have an online login to an institution, you can enter your account holdings manually.

1. From your Home page, click **Add Account**.

Home Organizer Goals Spending Investments Vault Reports

Welcome

Ryan Klinges

Customize

Attention Needed

eMoney National Bank
Login Credentials Needed **Repair**
22 days ago

Net Worth
\$102,665,809
as of today
\$102.6M
this month

Investments
\$103,020,837
as of today

Accounts [View All](#)

+ Add Account

| | |
|----------------------|---------------|
| Cash | \$64,168 |
| Credit Cards | -\$3,643 |
| Taxable | \$101,593,530 |
| Tax Advantaged | \$107,134 |
| Life Ins Cash Values | \$16,500 |
| Loans | -\$326,385 |
| Property | \$0 |

My Goals [View All](#)

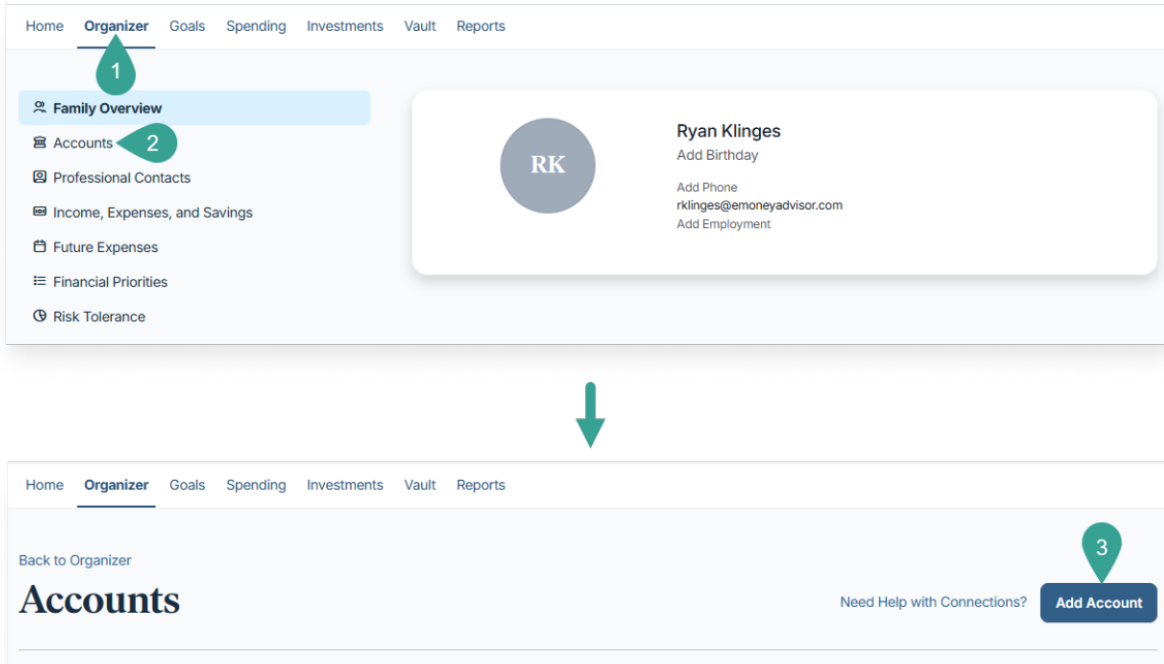
Retirement
2040 - 2065
Projected Funding

Spending [View All](#)

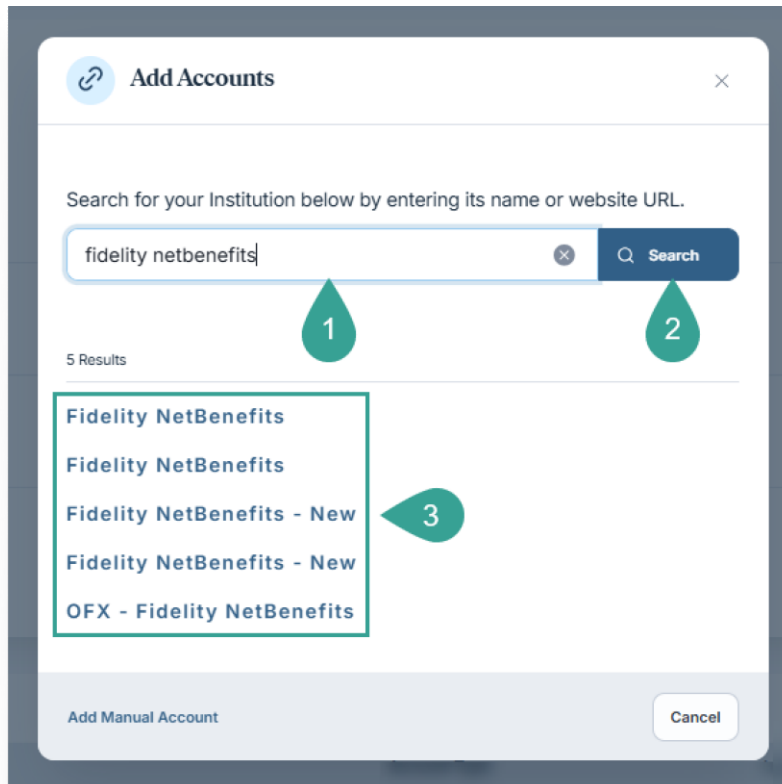
| | | |
|--------|----------|-------|
| Income | Expenses | Net |
| \$0 | -\$80 | -\$80 |

Add Account

You can also click **Organizer** in the menu, click **Accounts**, and click **Add Accounts**.

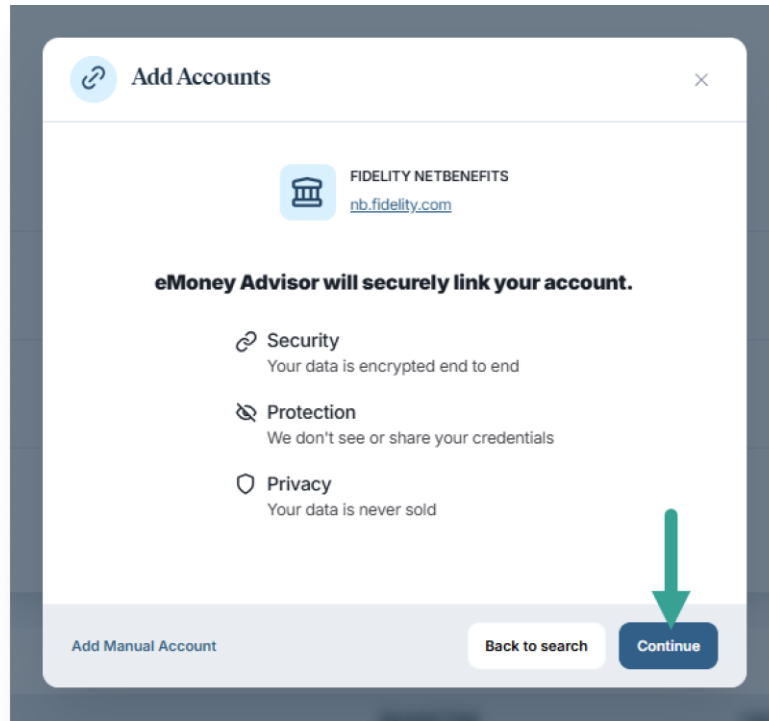


2. Enter the institution name and click **Search**. Then, select the correct institution name from the list. The manual entry option is explained in the next section.

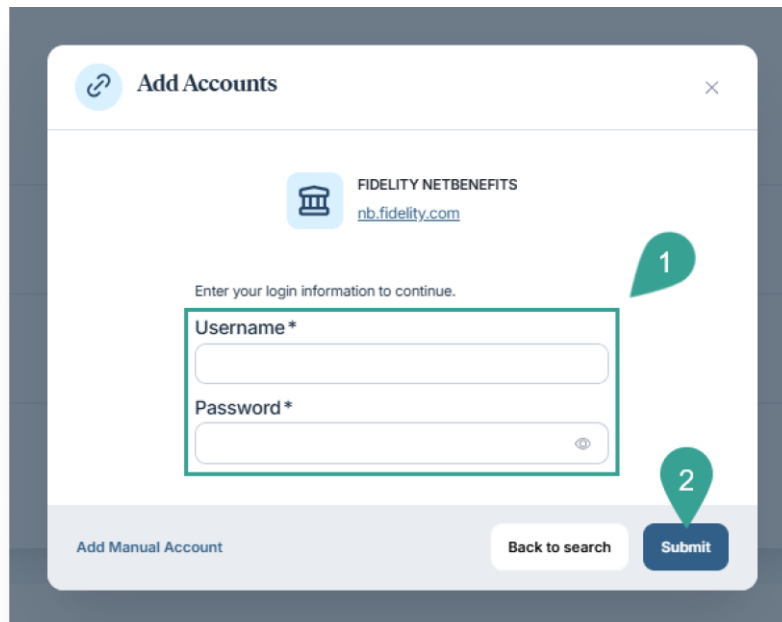


Add Account

3. Click **Continue** to authorize data linking.



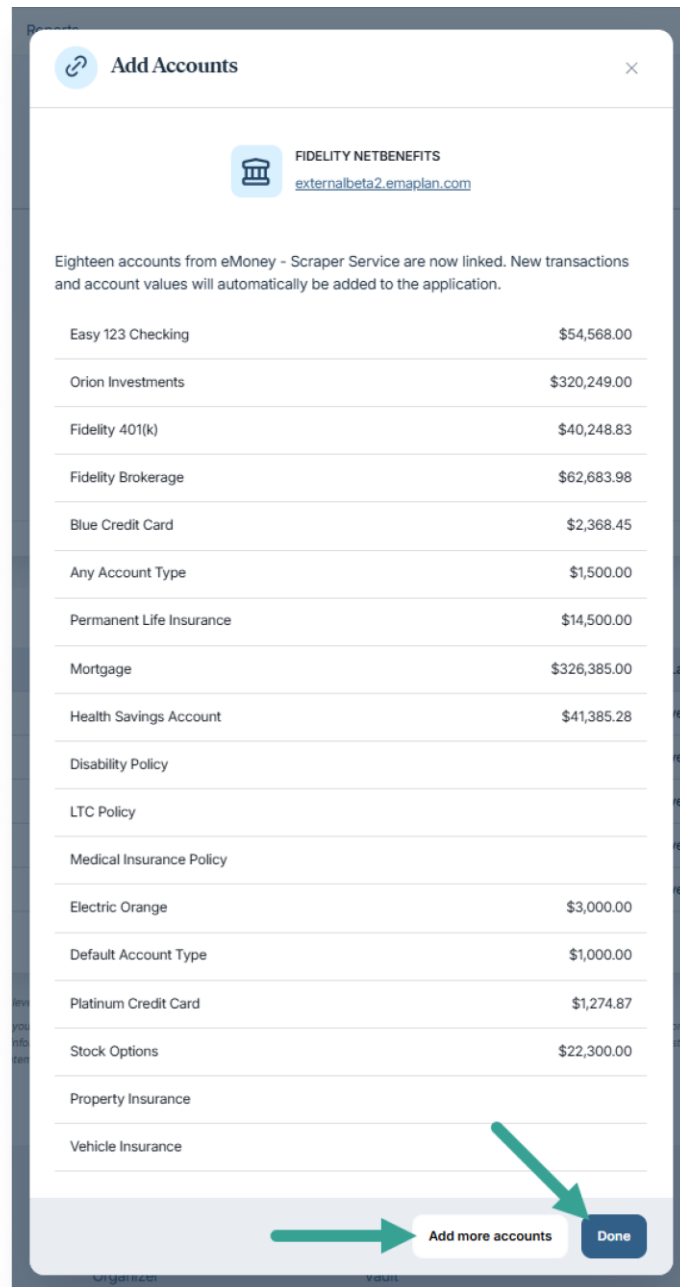
4. Enter your login **credentials** for this institution and click **Submit**.



If there is an issue connecting to your accounts, you will receive a status message describing the problem, and you can click on the message to learn how to fix it.

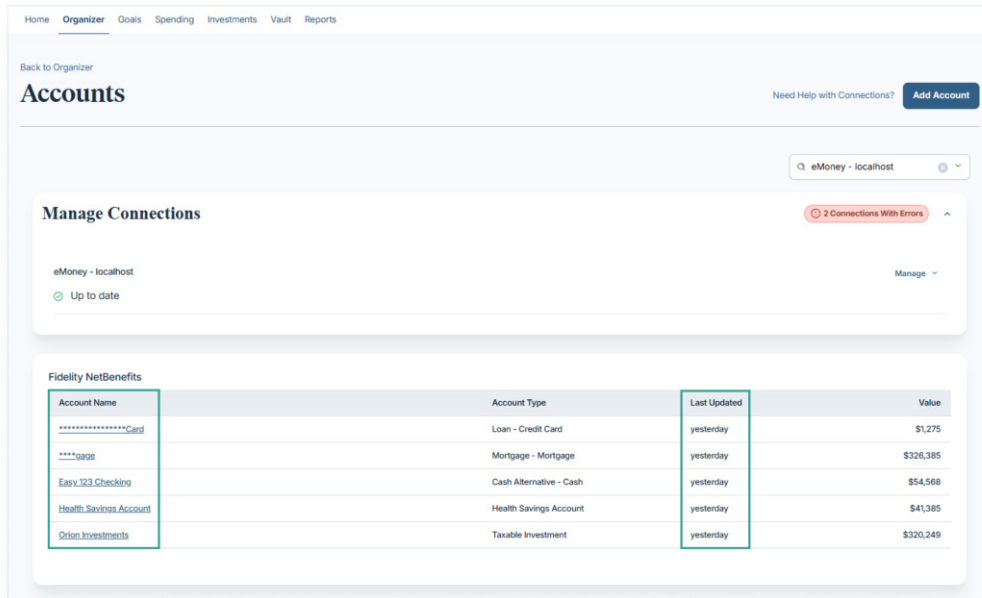
Add Account

- Once your credentials have been verified, you can review the accounts brought over through the connection. Click **Done** to return to an overview of all accounts you have entered in your portal. You can also select to **Add more accounts**.



Add Account

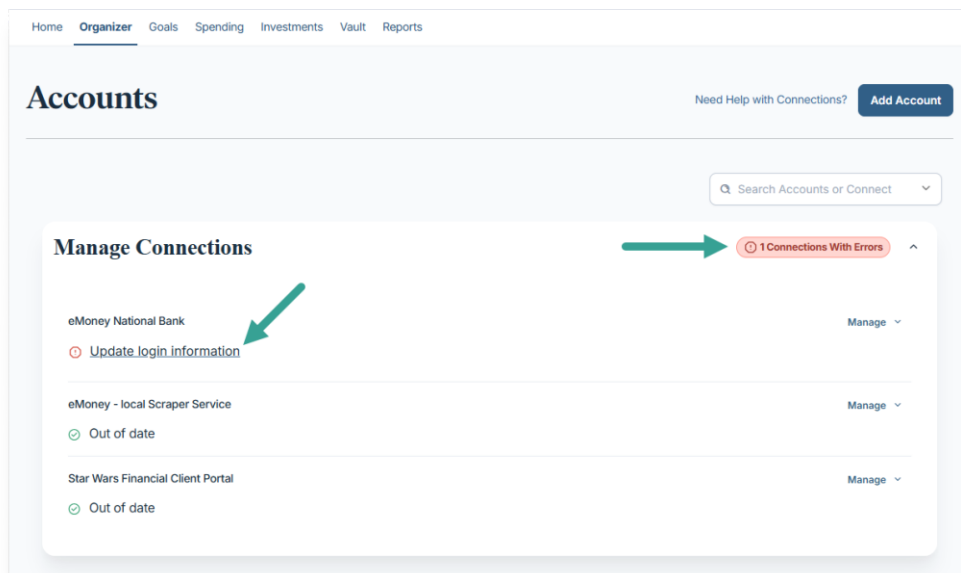
6. On the Accounts page, you can easily see when your accounts with an institution last updated or if any accounts are in an error state.



Connection Management

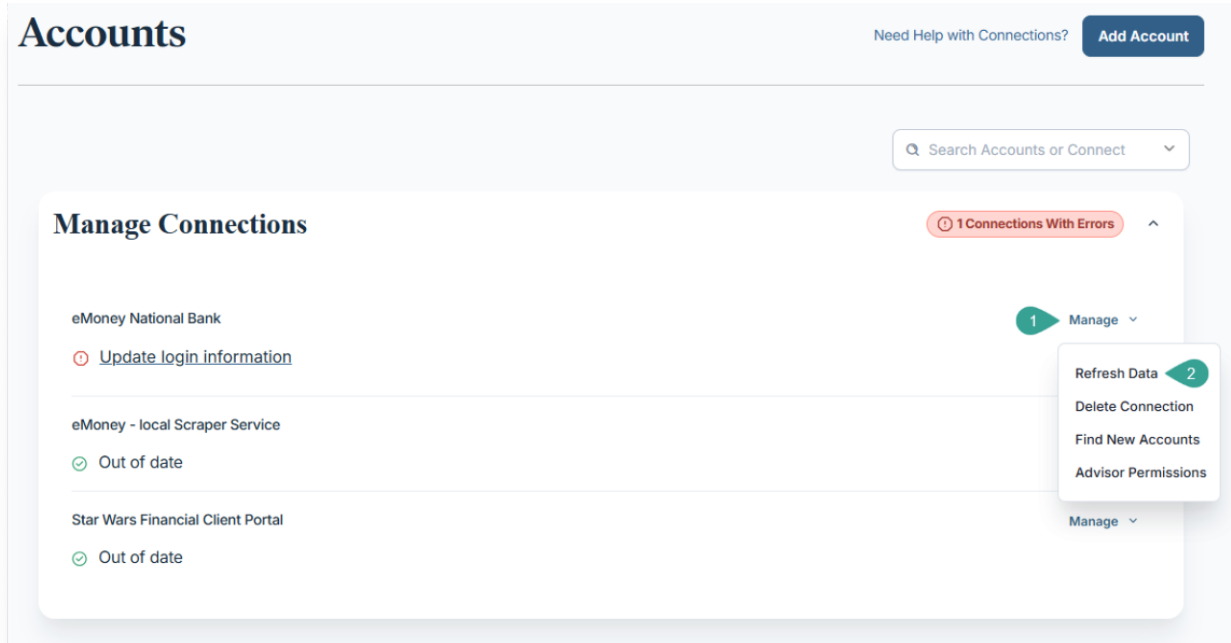
The Manage Connections section displays each attempted Connection institution and lets you take key actions. Each connection you establish will require maintenance. For example, if you updated your password at the institution, you would need to update the credentials on the connection in your portal.

1. Errors you may be able to repair will appear first in the list with their **name as a link** that you can click to fix the issue.

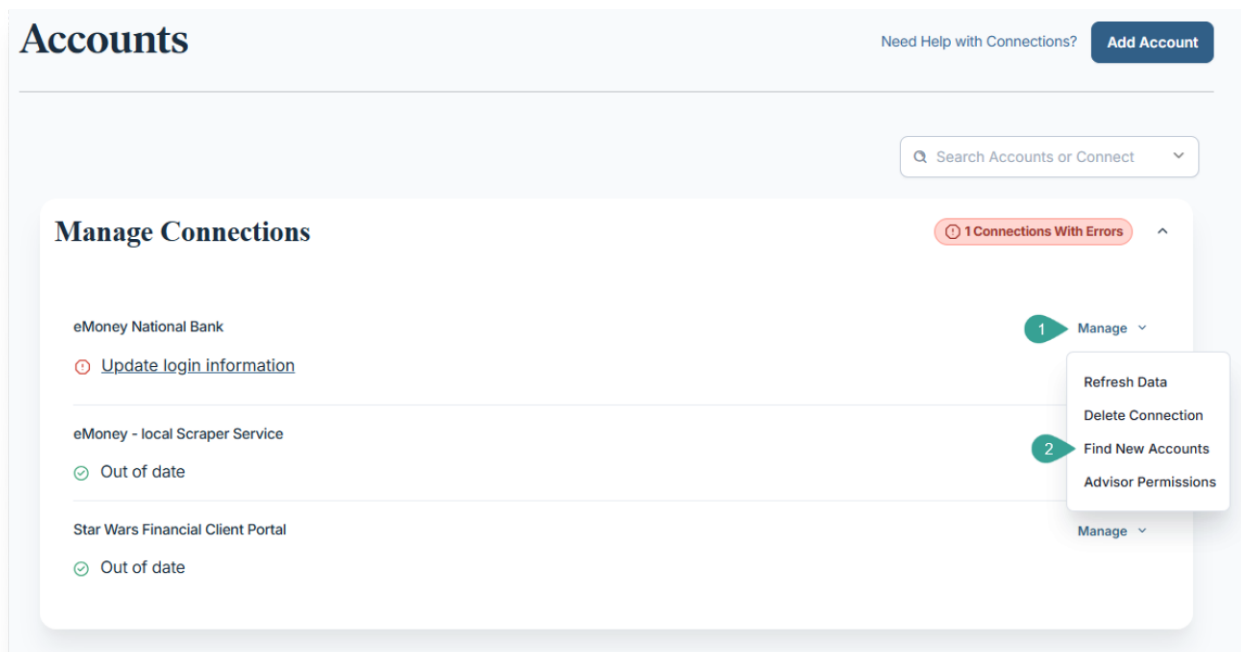


Add Account

2. Click the **Manage** drop-down menu to take a handful of actions to manage your Connections:
 - a. Select **Refresh Data** on the connection anytime to pull over updated account values manually.

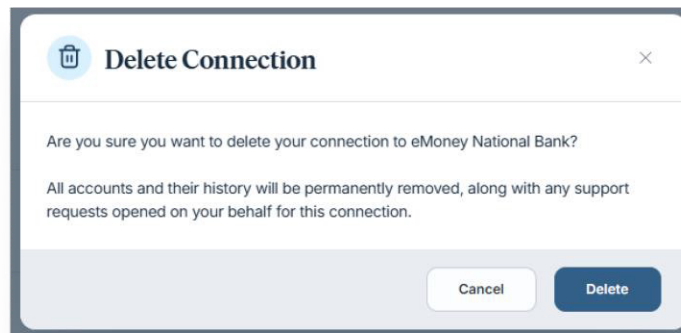
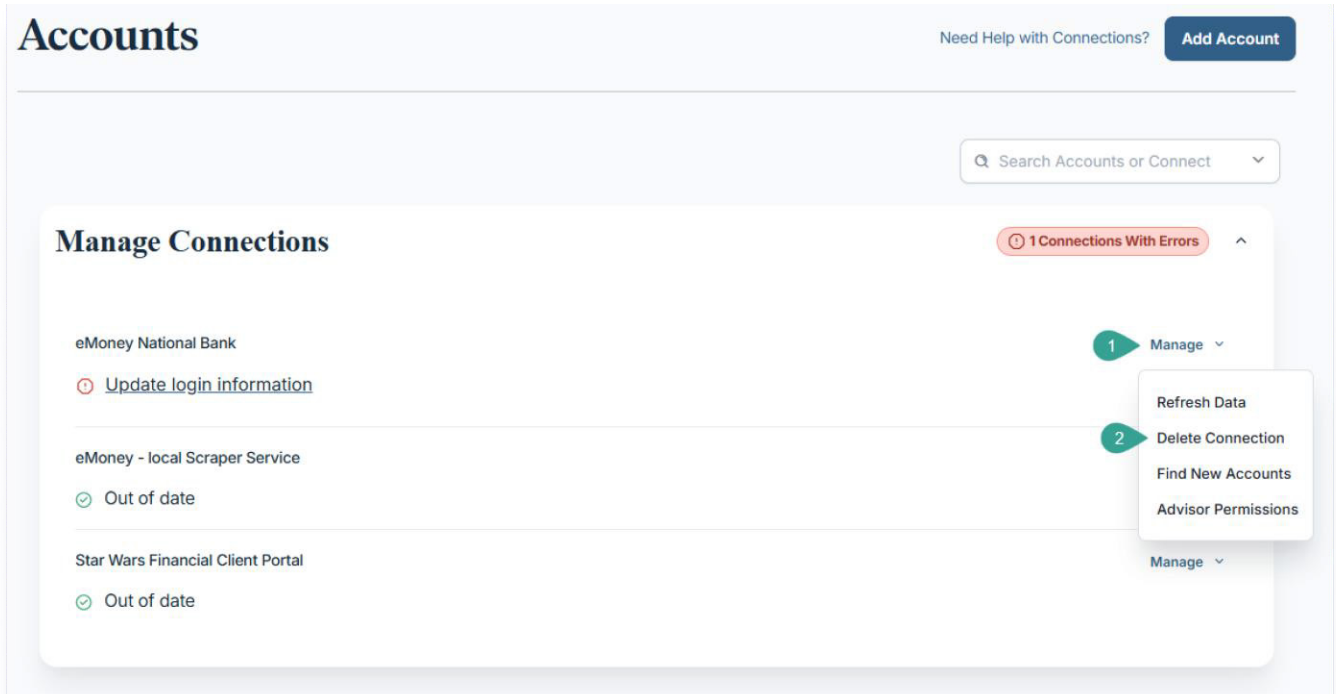


- b. Select **Find New Accounts** to pull any new accounts opened after establishing the Connection.



Add Account

c. Select **Delete Connection** to remove the connection and all associated accounts.

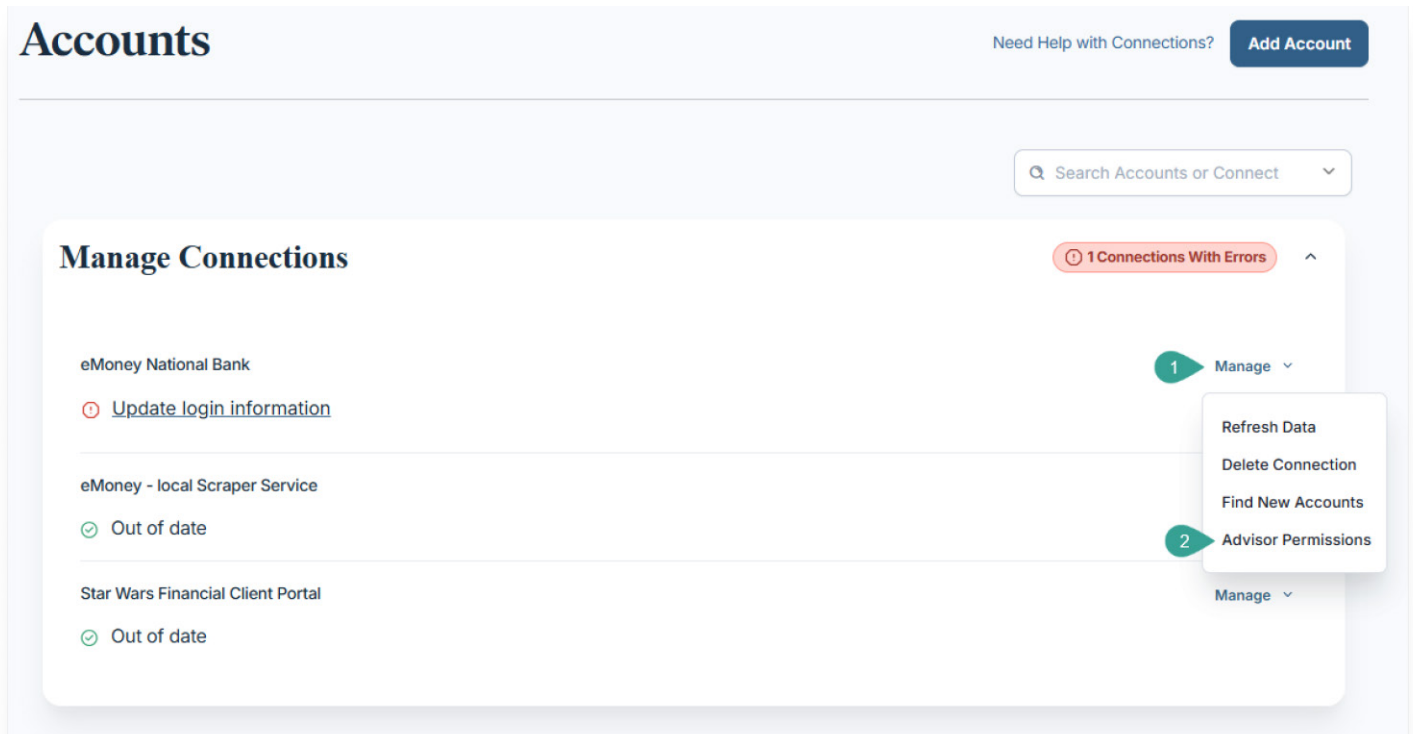


① Note

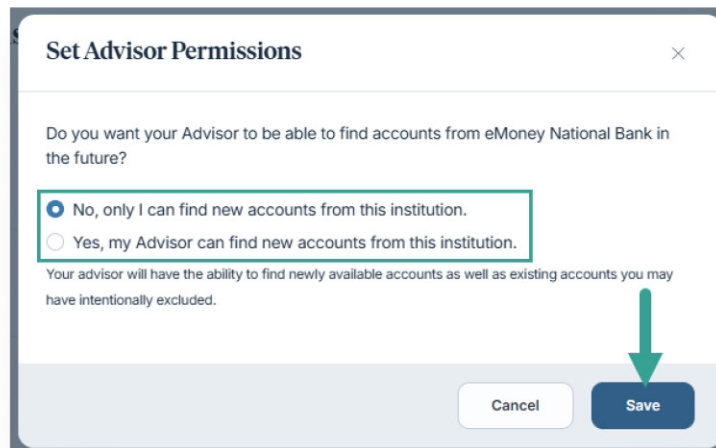
If you **Delete** the Connection, you will lose all accounts and transaction history. This is not recommended unless the connection and its accounts are no longer needed.

Add Account

- d. The **Advisor Permissions** selection displays a pop-up that allows you to enable your Advisor to **Find New** accounts on your behalf.



The screenshot shows the 'Accounts' management page. At the top left is the title 'Accounts'. On the top right, there is a link 'Need Help with Connections?' and a blue 'Add Account' button. Below this is a search bar labeled 'Search Accounts or Connect'. The main content area is titled 'Manage Connections' and features a red notification bubble that says '1 Connections With Errors'. A list of connections is shown, including 'eMoney National Bank', 'eMoney - local Scraper Service', and 'Star Wars Financial Client Portal'. A dropdown menu is open for the 'eMoney National Bank' connection, showing options: 'Refresh Data', 'Delete Connection', 'Find New Accounts', and 'Advisor Permissions'. A green arrow points to the 'Advisor Permissions' option.



The screenshot shows a 'Set Advisor Permissions' dialog box. The title is 'Set Advisor Permissions' with a close button (X) in the top right corner. The main text asks: 'Do you want your Advisor to be able to find accounts from eMoney National Bank in the future?'. There are two radio button options: 'No, only I can find new accounts from this institution.' (which is selected and highlighted with a green box) and 'Yes, my Advisor can find new accounts from this institution.'. Below the options is a note: 'Your advisor will have the ability to find newly available accounts as well as existing accounts you may have intentionally excluded.'. At the bottom right, there are two buttons: 'Cancel' and 'Save'. A green arrow points to the 'Save' button.

Add Account

Adding Manual Accounts

Note

If you do not have the following options, please contact your advisor.

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

Home Organizer Goals Spending Investments Vault Reports

Welcome

Ryan Klinges

Customize

Attention Needed

eMoney National Bank
Login Credentials Needed
Repair
22 days ago

Accounts

View All

+ Add Account

| | | |
|--------------|---------------|---|
| Cash | \$64,168 | ▼ |
| Credit Cards | -\$3,643 | ▼ |
| Taxable | \$101,593,530 | ▼ |

Net Worth

\$102,665,809
as of today

\$102.6M
this month

Investments

\$103,020,837
as of today

My Goals

View All

Retirement

2040 - 2065
Projected Funding

Home Organizer Goals Spending Investments Vault Reports

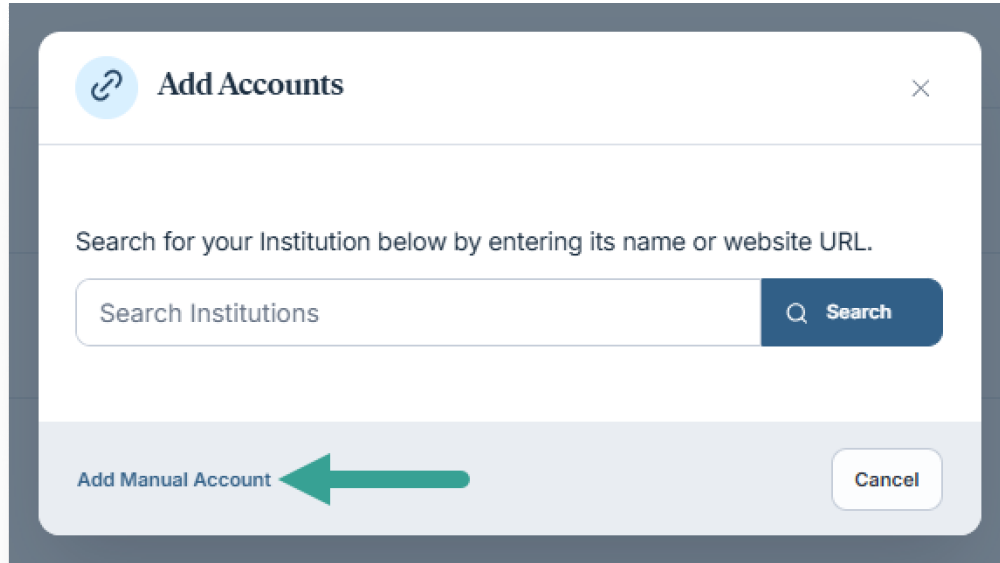
Back to Organizer

Accounts

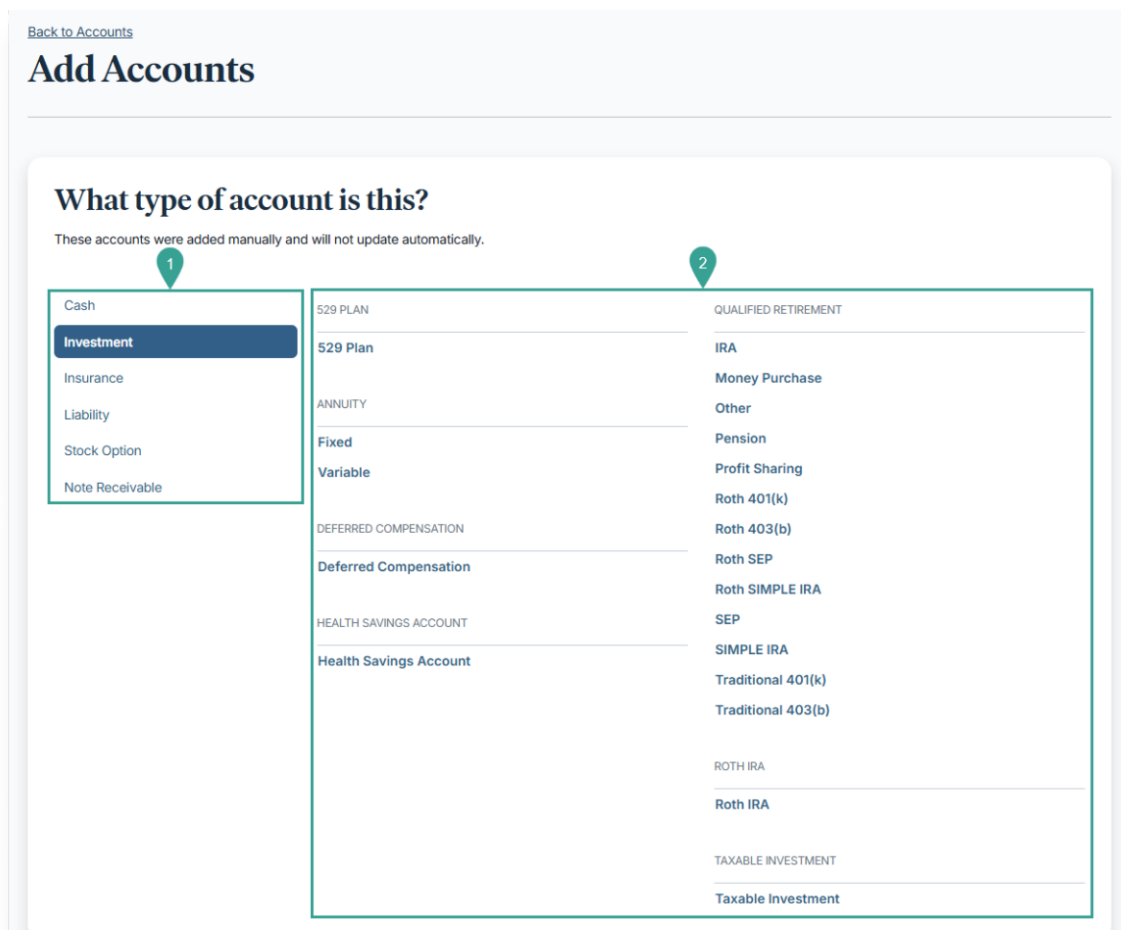
Need Help with Connections? Add Account

Add Account

2. Click **Add Manual Account**.

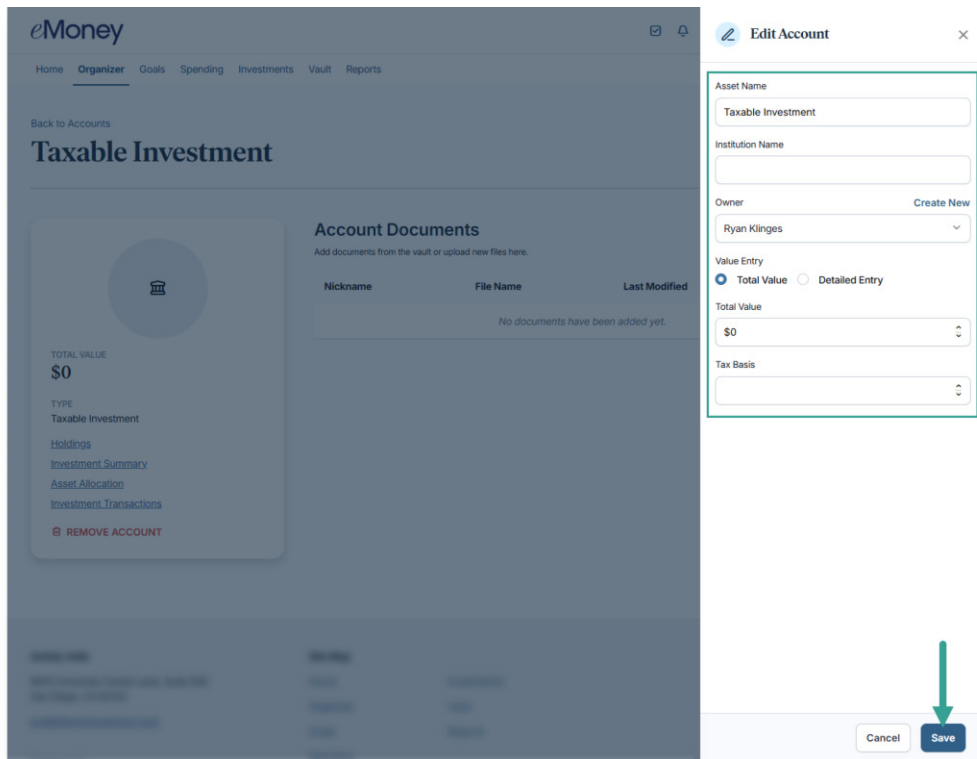


3. Select the **account category** and specific **type**.

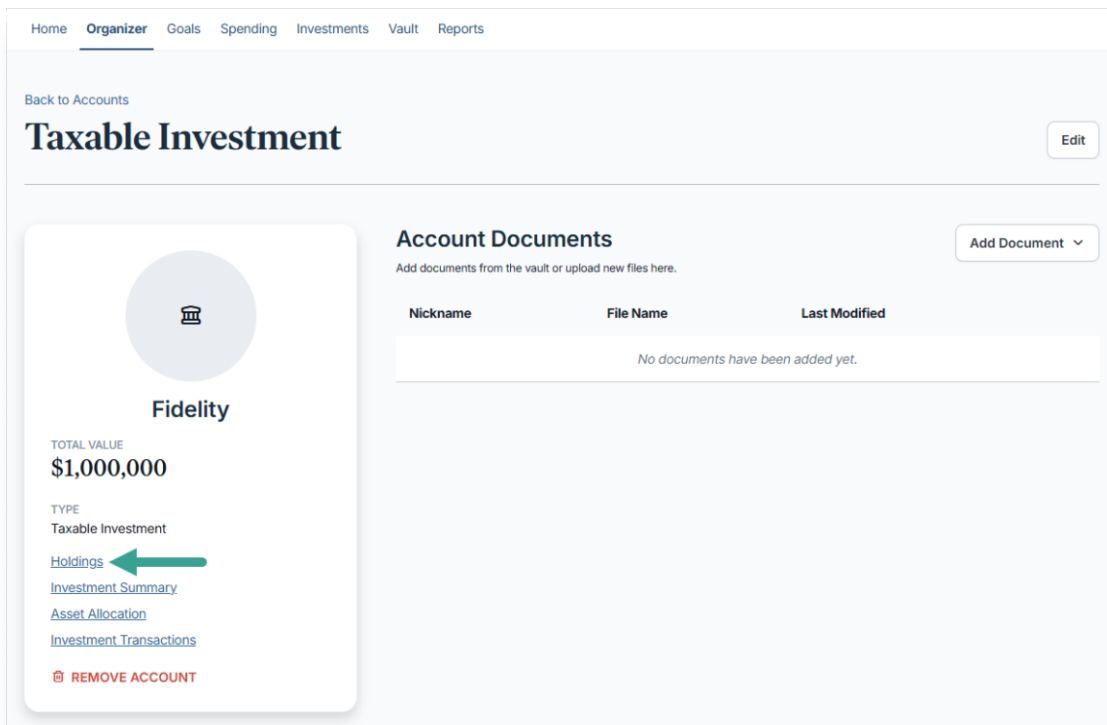


Add Account

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

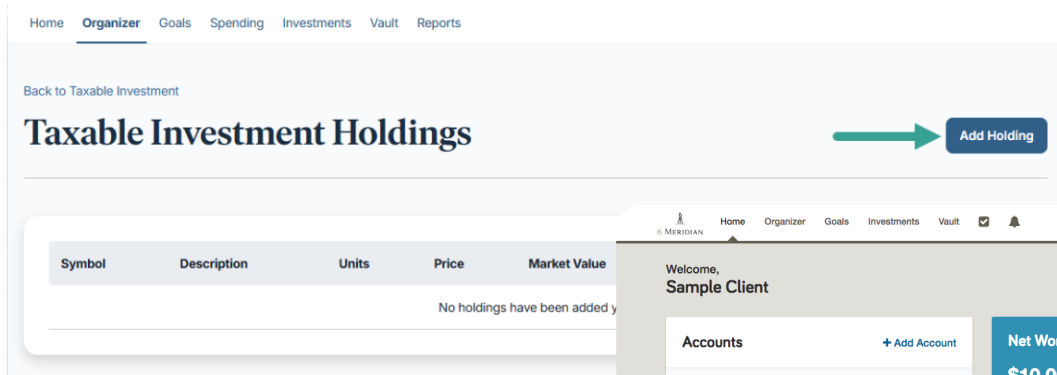


5. Click **Holdings**.

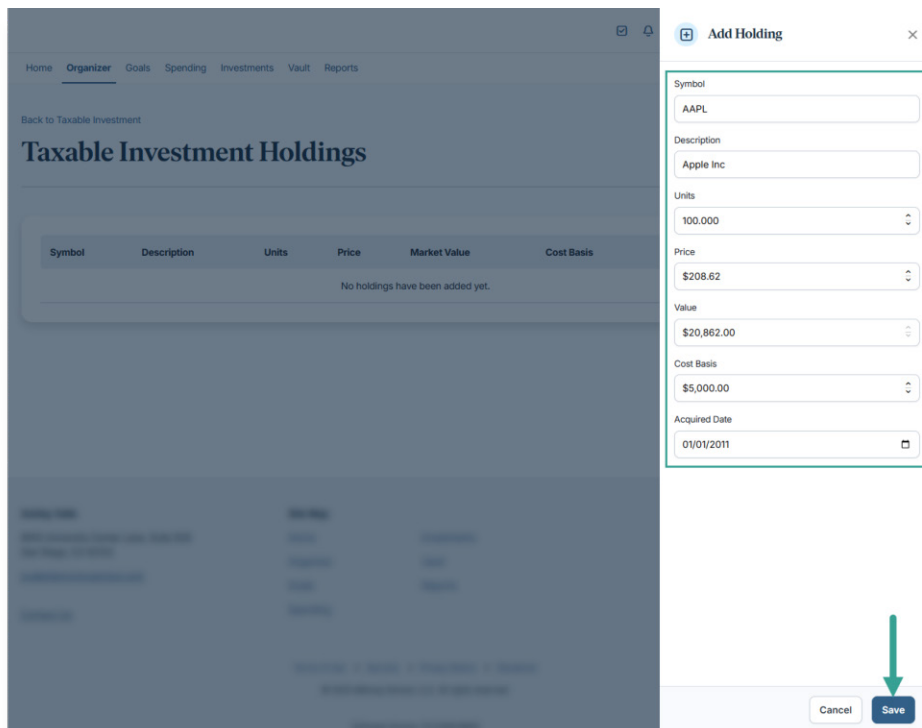
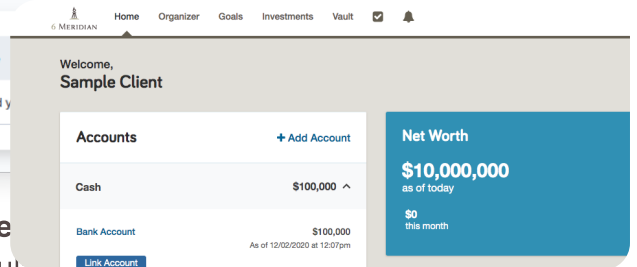


Add Account

6. Click **Add Holding**.

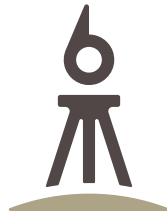


7. For publicly traded holdings, enter the respective **ticker** or click away; the stock Description and Price will populate automatically. Enter the number of **Units**, **Cost Basis**, and **Acquired Date**, then click **Save**.



Note

For private holdings, enter \$\$\$ for the Ticker and enter the appropriate holding description, cost, and other information.



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

316.776.4601 • 8301 E. 21st, St. N. #150, Wichita KS 67206

Source: eMoney, 3/3/2026

Third-party links and references are provided solely to share social, cultural and educational information. Any reference in this post to any person, or organization, or activities, products, or services related to such person or organization, or any linkages from this post to the web site of another party, do not constitute or imply the endorsement, recommendation, or favoring of 6 Meridian or Hightower Advisors, LLC, or any of its affiliates, employees or contractors acting on their behalf. Hightower Advisors, LLC, do not guarantee the accuracy or safety of any linked site.