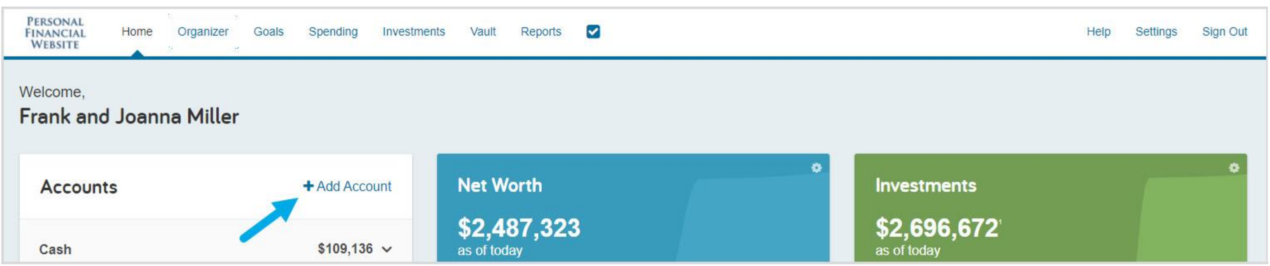
Add Accounts

In this user guide, we will demonstrate how to add both connected accounts and manual accounts.

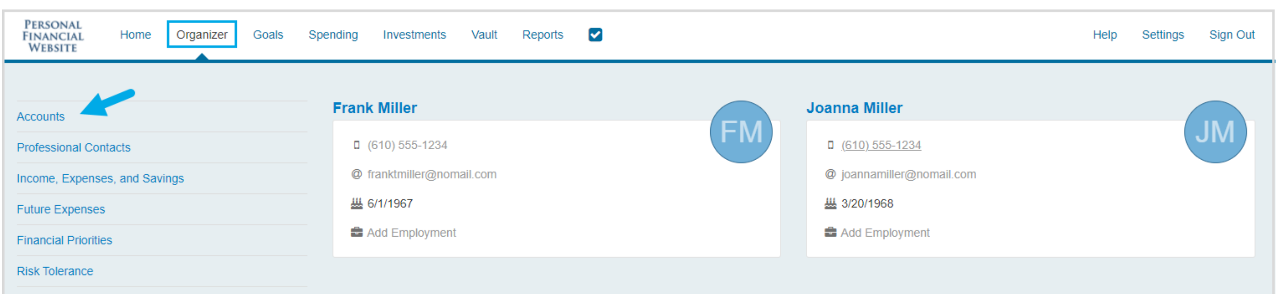
Establishing connections to your personal banking institutions will allow your account information to be updated automatically. If you do not have an online login to an institution, you can enter your accounts manually. While manual accounts do NOT update, they help build a better financial snapshot for both you and your Advisor.

Adding Connected Accounts

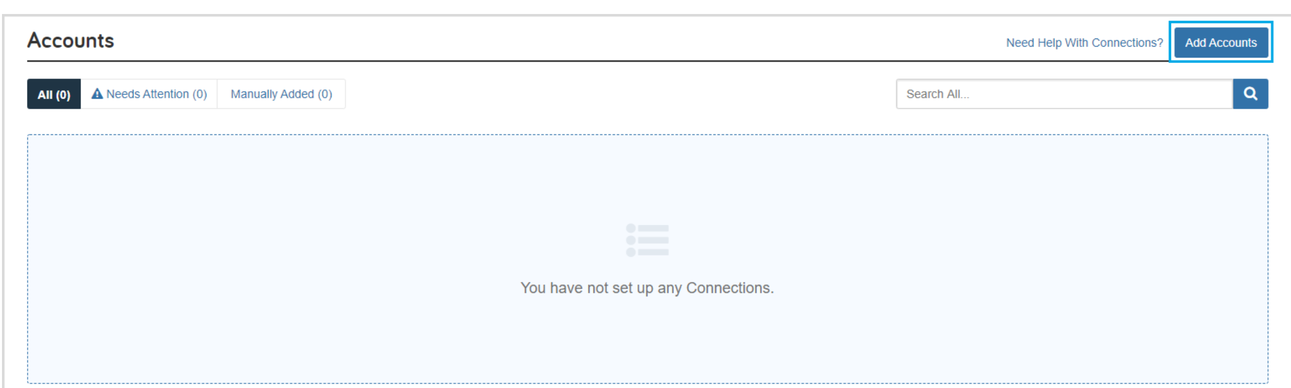
1. From your Home page, click **Add Account**.



You can also click **Organizer** on the menu, then click **Accounts**.



2. Click **Add Accounts**.



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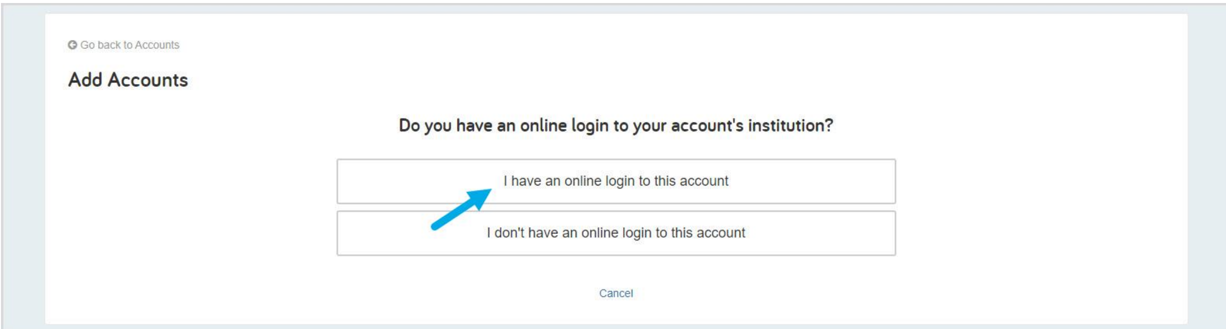
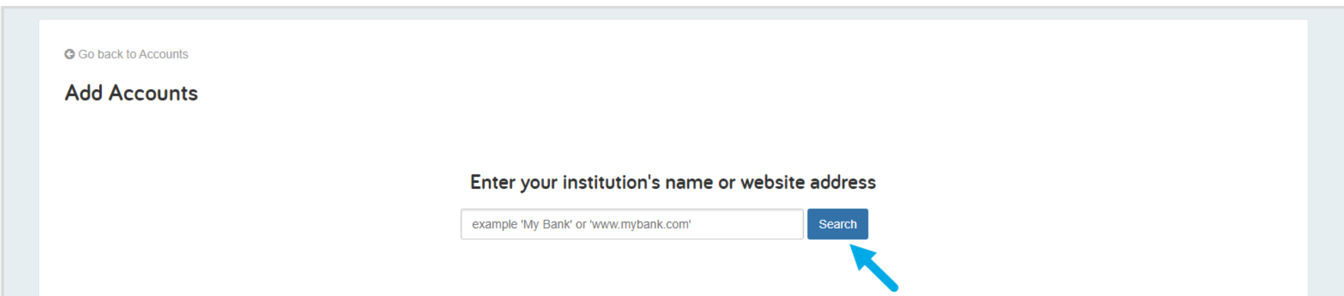
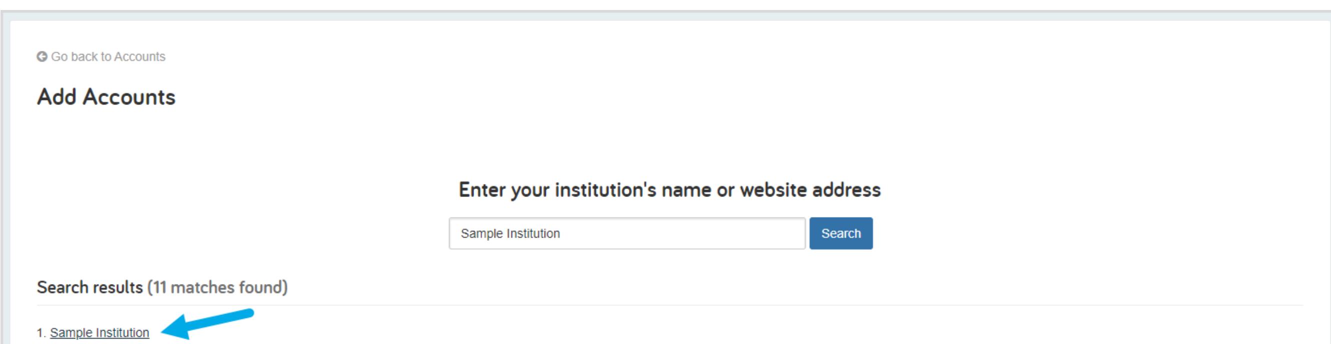
3. Click **I have an online login to this account**. (Manual entry is explained in the next section.)



4. Enter the name of the institution or website address, then click **Search**.



5. Select the connection from the search returns.



6. If an Acknowledge Institution Notice screen appears, you should read the notice, and then click **Continue**.

   This notice varies by institution and will inform you of any important information related to this institution's connection.

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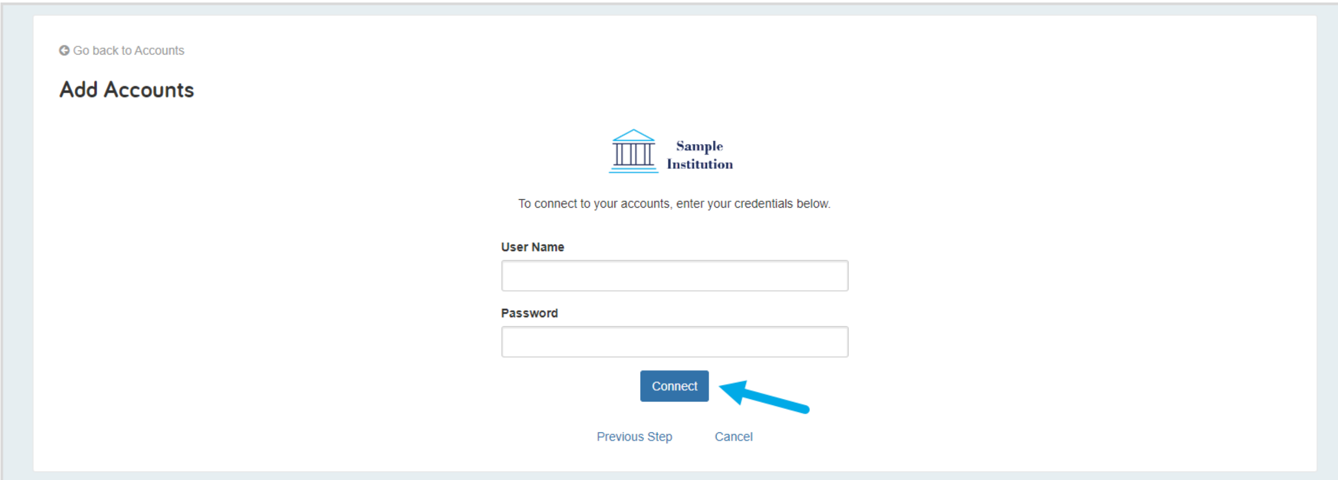
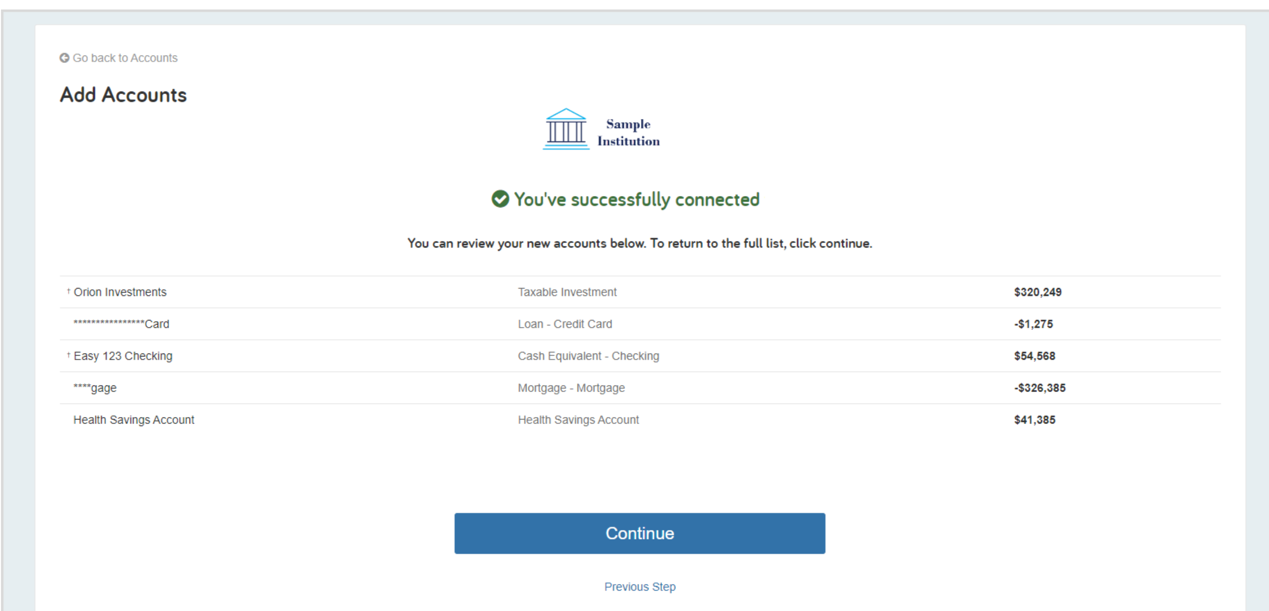
7. Enter your login credentials for this institution and click **Connect**.



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.

8. 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.



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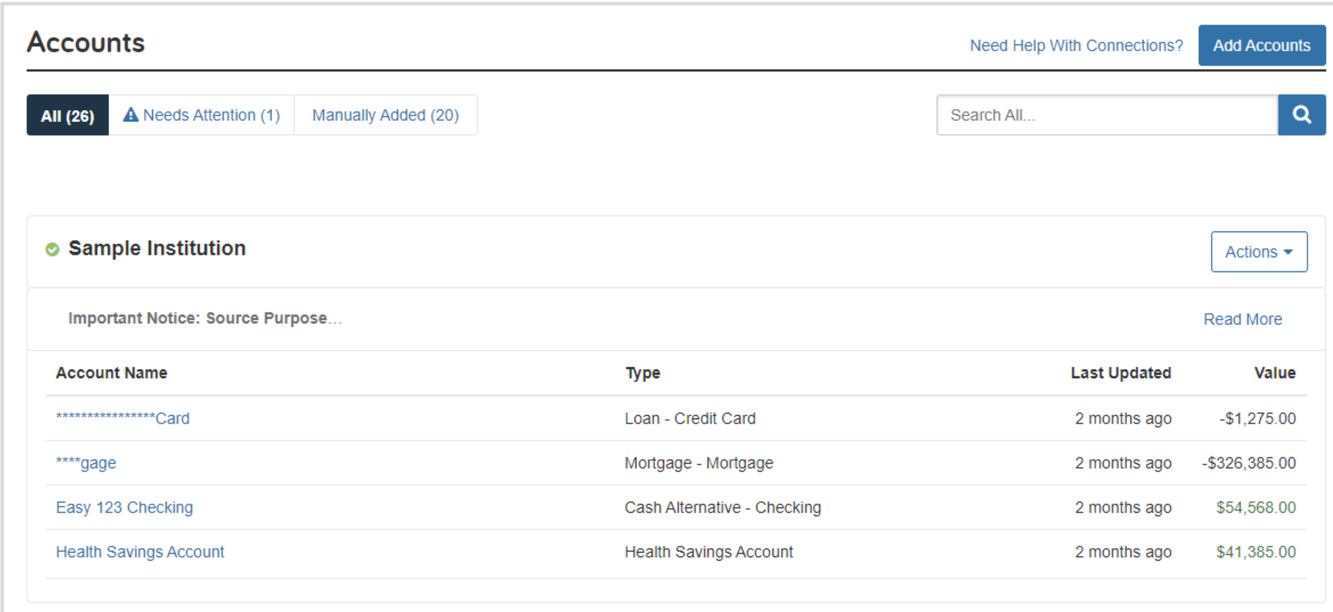
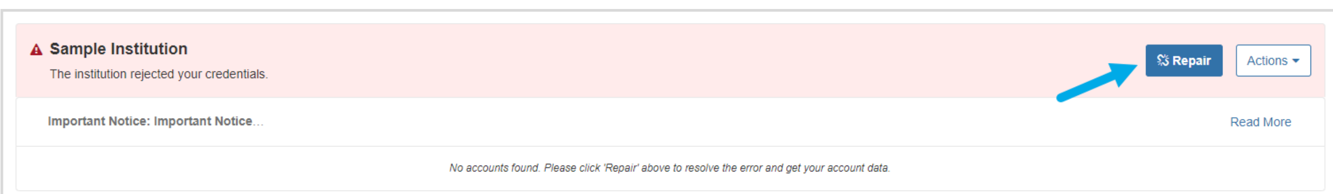
9. On the Accounts page you can easily see when your accounts with an institution last updated or if any accounts are in an error state.

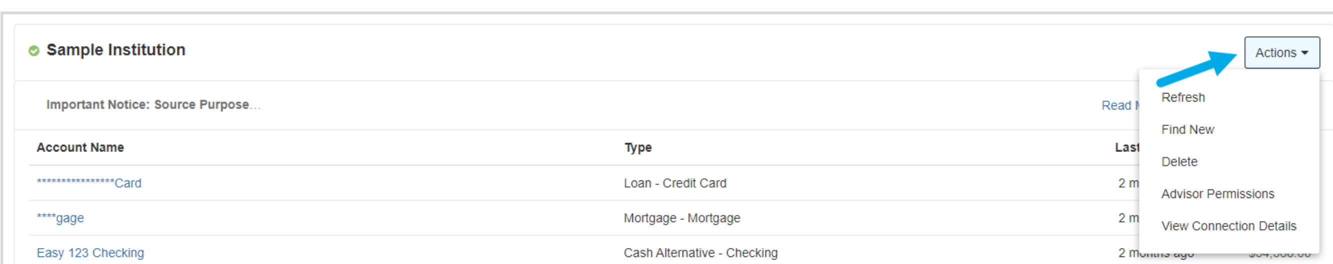


10. Each connection you establish will have its own specific maintenance required. For example, if you updated your password at the institution you will need to then update the credentials on the connection in your portal.

    Errors that you can repair will appear with a **Repair** button that you can click to fix the issue.



    With the Actions menu, you can **Refresh** the connection to pull over updated account values, **Find New accounts, Delete** the connection, access **Advisor Permissions,** or **View Connection Details.**



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.

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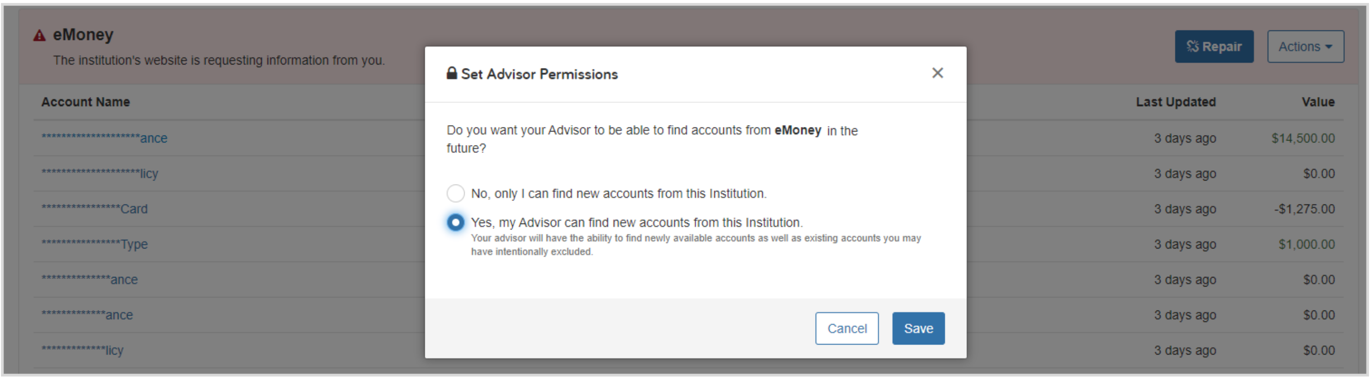
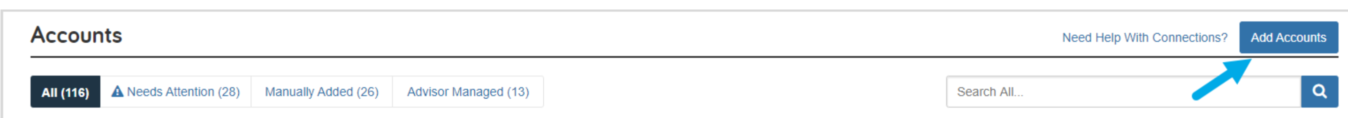
The **Advisor Permissions** selection displays a popup that allows you to enable your Advisor to find new accounts on your behalf.

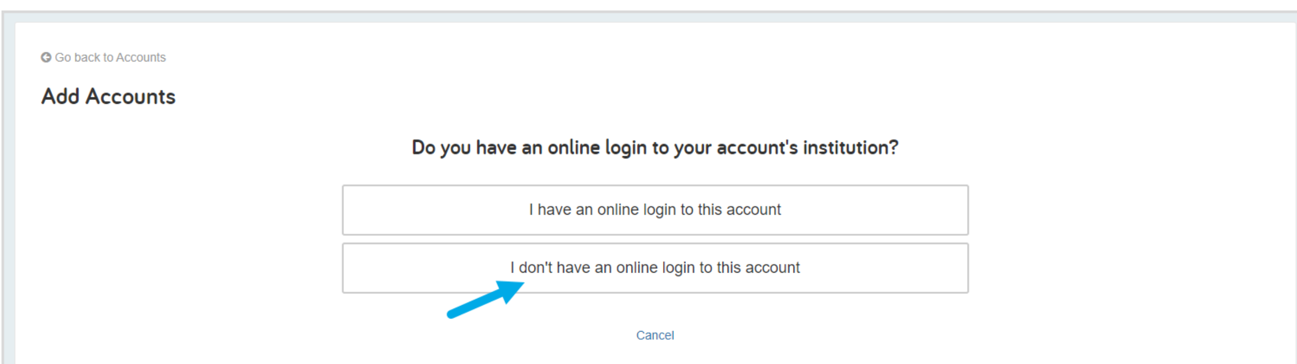


Adding Manual Accounts

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



2. Click **I don't have an online login to this account**.



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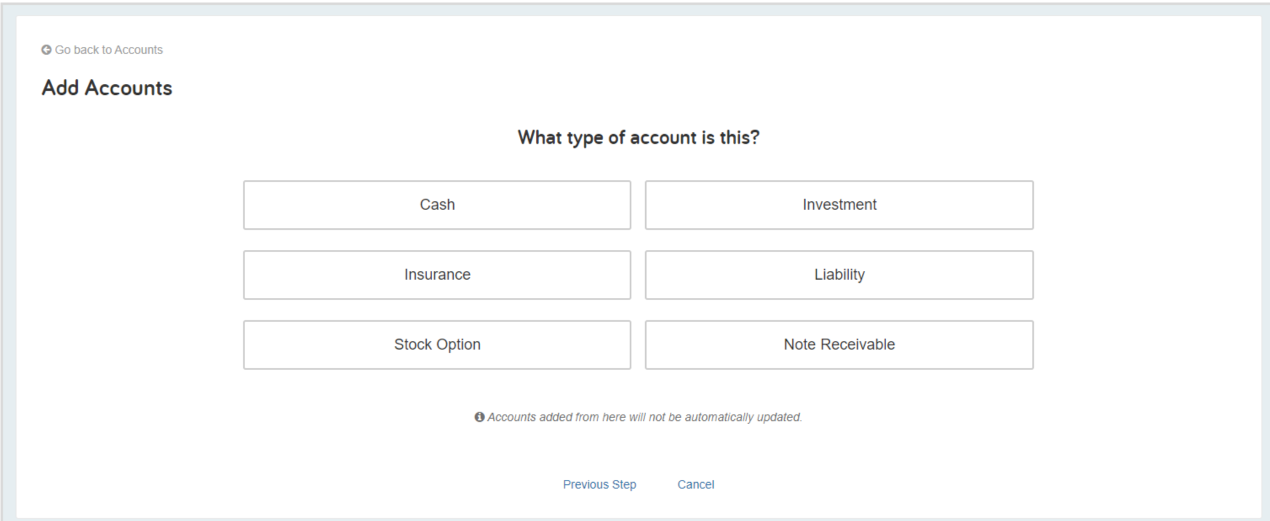
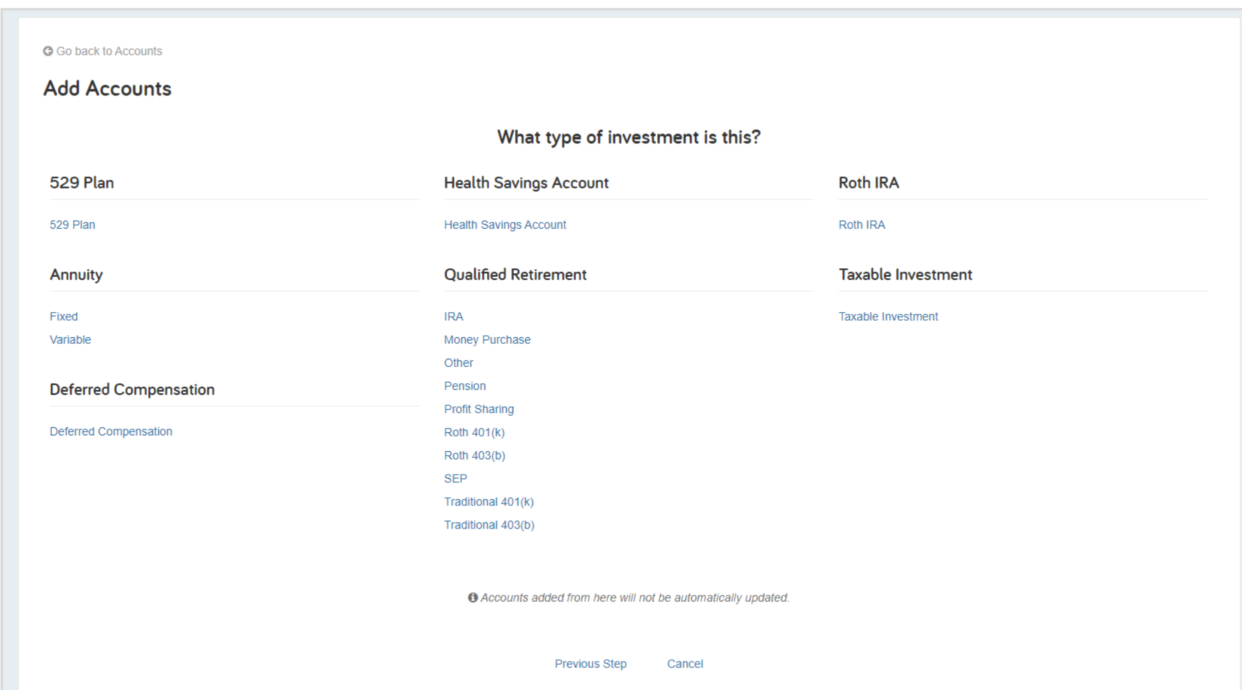
3. Select the type of account.



4. Then, click the more specific type of account.



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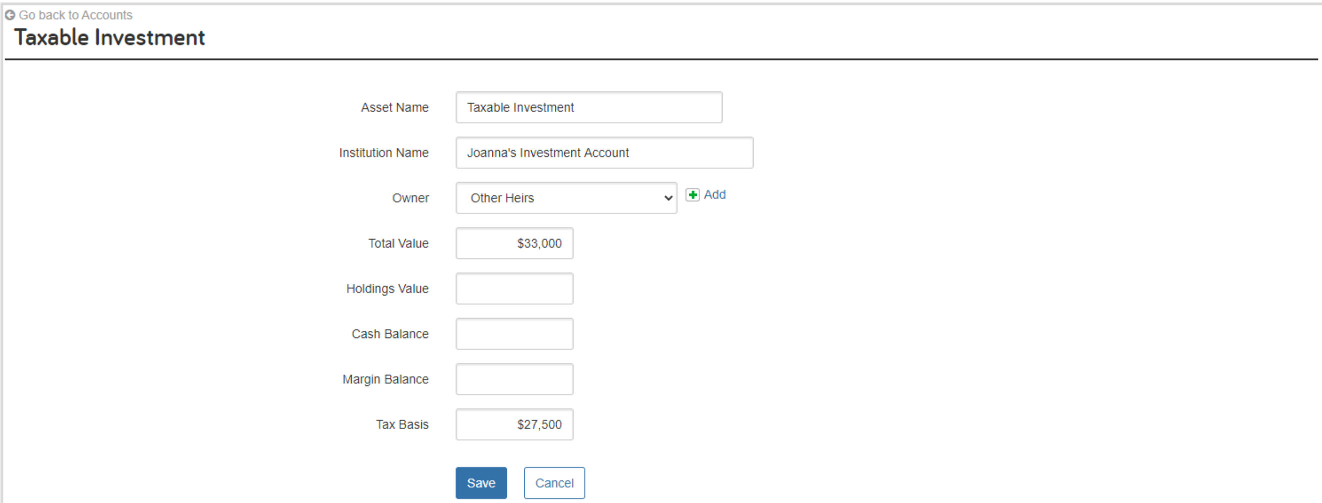
5. Enter details about the account and click **Save**.



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