

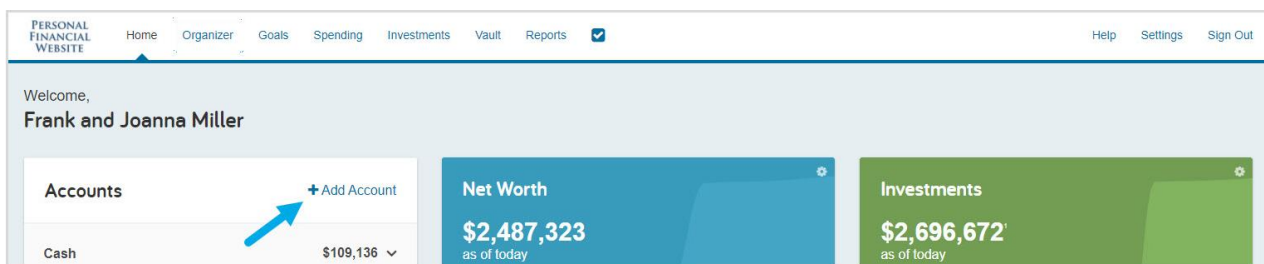
Add Accounts

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

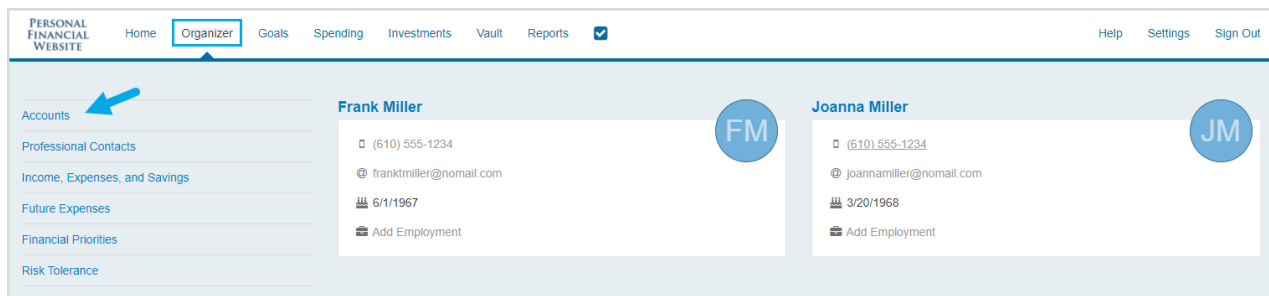
Establishing connections to your personal banking institutions will allow your account information to be updated automatically. If you do not have an online login to an institution, you can enter your accounts manually. While manual accounts do NOT update, they help build a better financial snapshot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

Adding Connected Accounts

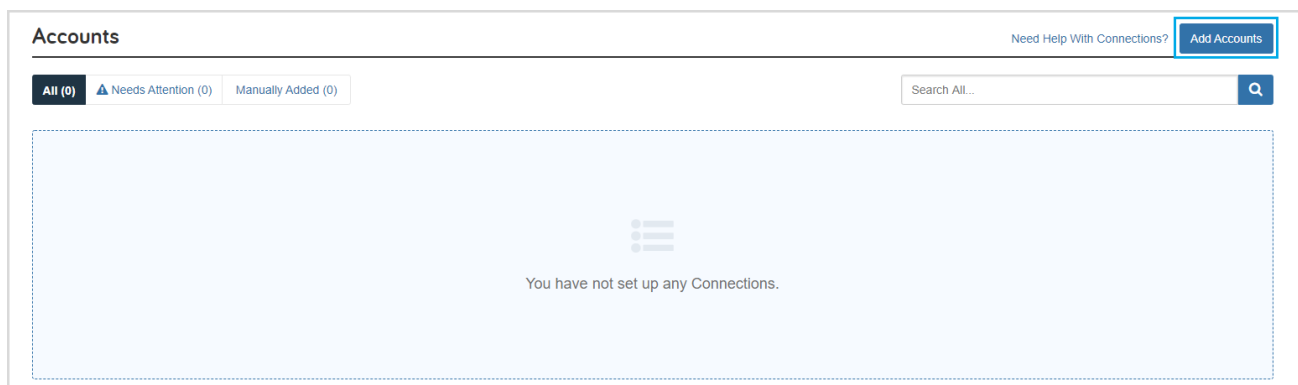
1. From your Home page, click **Add Account**.



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

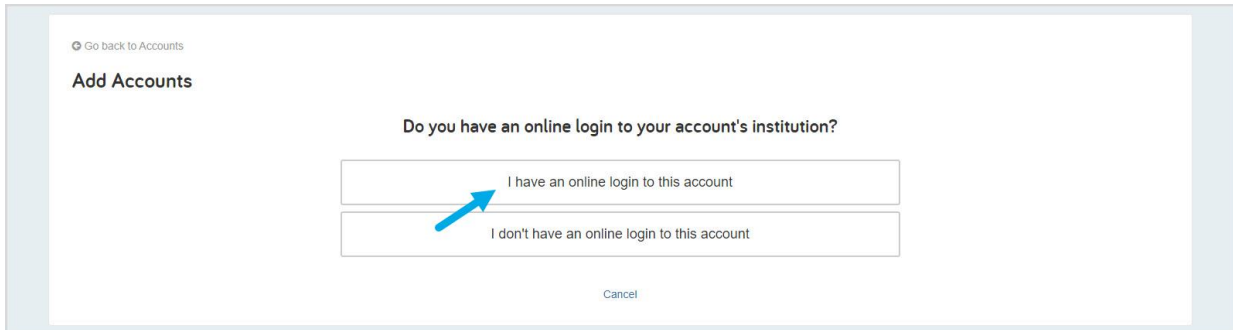


2. Click **Add Accounts**.



Add Accounts

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



Go back to Accounts

Add Accounts

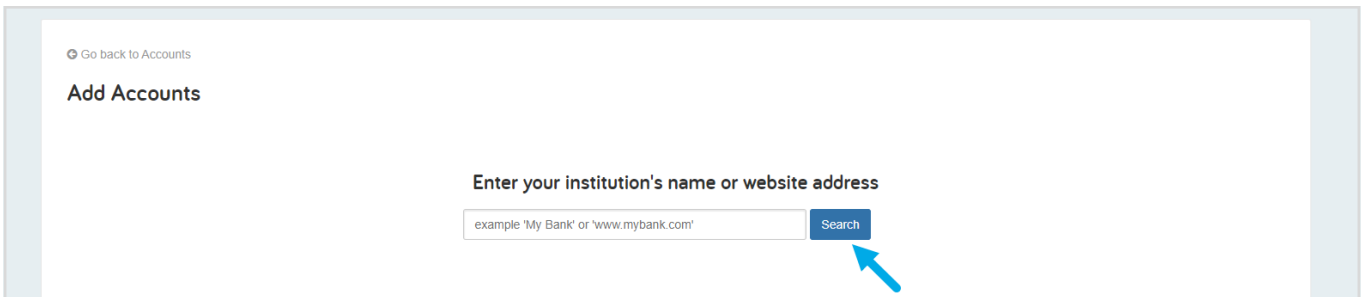
Do you have an online login to your account's institution?

I have an online login to this account

I don't have an online login to this account

Cancel

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



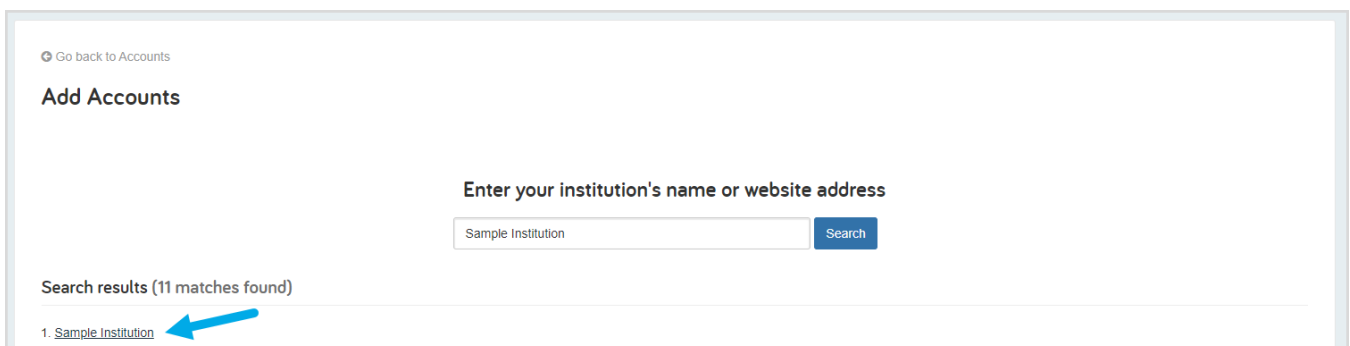
Go back to Accounts

Add Accounts

Enter your institution's name or website address

example 'My Bank' or 'www.mybank.com'

5. Select the connection from the search returns.



Go back to Accounts

Add Accounts

Enter your institution's name or website address

Sample Institution

Search results (11 matches found)

1. [Sample Institution](#)

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.

Add Accounts

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

Go back to Accounts

Add Accounts

 **Sample Institution**

To connect to your accounts, enter your credentials below.

User Name

Password

Connect ←


[Previous Step](#) [Cancel](#)

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.

Go back to Accounts

Add Accounts

 **Sample Institution**

✔ You've successfully connected

You can review your new accounts below. To return to the full list, click continue.

† Orion Investments	Taxable Investment	\$320,249
*****Card	Loan - Credit Card	-\$1,275
† Easy 123 Checking	Cash Equivalent - Checking	\$54,568
****gaga	Mortgage - Mortgage	-\$326,385
Health Savings Account	Health Savings Account	\$41,385

Continue

[Previous Step](#)

Add Accounts

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.

The screenshot shows the 'Accounts' page for a 'Sample Institution'. At the top right, there are links for 'Need Help With Connections?' and 'Add Accounts'. Below this, there are filter buttons: 'All (26)', 'Needs Attention (1)', and 'Manually Added (20)'. A search bar is also present. The main content area shows an 'Important Notice' and a table of accounts.

Account Name	Type	Last Updated	Value
*****Card	Loan - Credit Card	2 months ago	-\$1,275.00
****gage	Mortgage - Mortgage	2 months ago	-\$326,385.00
Easy 123 Checking	Cash Alternative - Checking	2 months ago	\$54,568.00
Health Savings Account	Health Savings Account	2 months ago	\$41,385.00

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.

The screenshot shows an account connection for a 'Sample Institution' in an error state. A red banner at the top contains a warning icon and the text 'The institution rejected your credentials.' To the right of this banner is a blue 'Repair' button with a refresh icon, which is pointed to by a blue arrow. Below the banner is an 'Important Notice' and a 'Read More' link. At the bottom of the card, a message reads: 'No accounts found. Please click 'Repair' above to resolve the error and get your account data.'

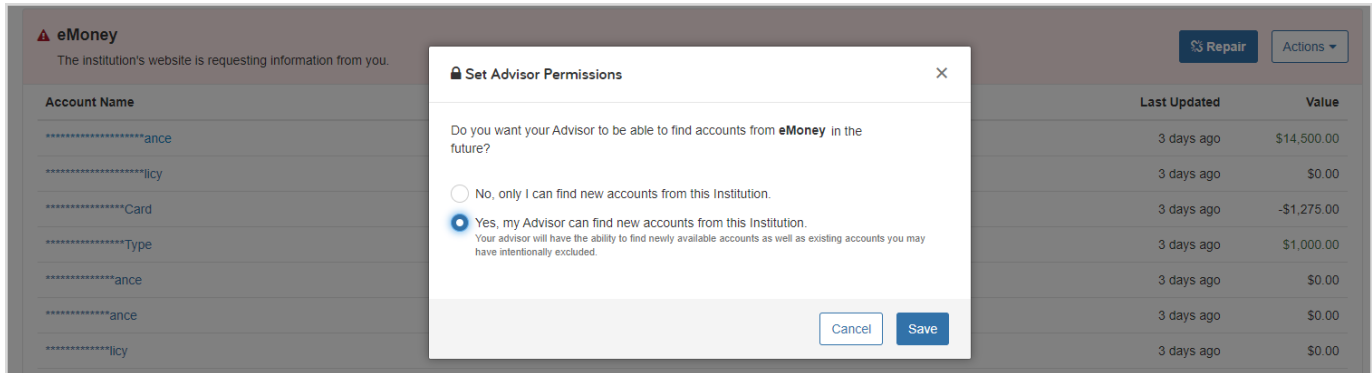
With the Actions menu, you can **Refresh** the connection to pull over updated account values, **Find New accounts**, **Delete** the connection, access **Advisor Permissions**, or **View Connection Details**.

This screenshot is similar to the one in step 9, but the 'Actions' dropdown menu is open. A blue arrow points to the 'Actions' button. The menu options are: Refresh, Find New, Delete, Advisor Permissions, and 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.

Add Accounts

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

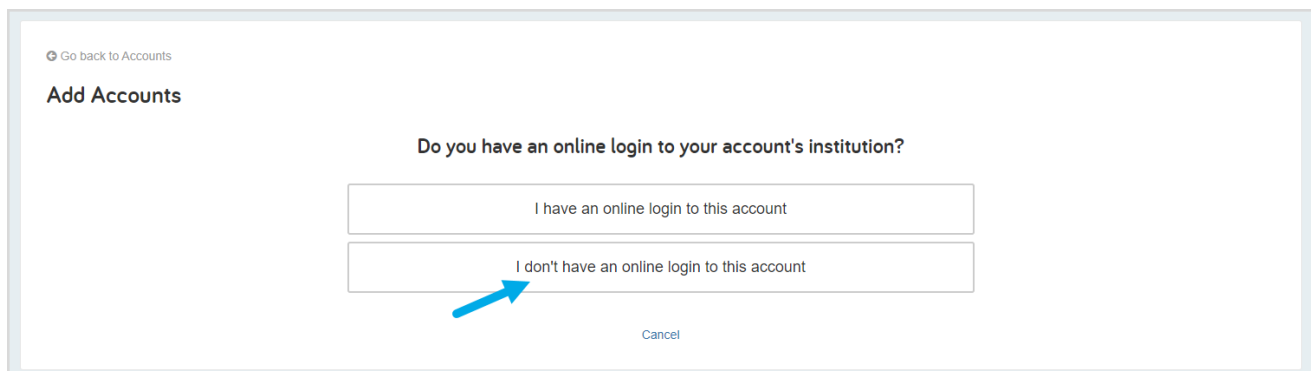


Adding Manual Accounts

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



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



Add Accounts

3. Select the type of account.

[Go back to Accounts](#)

Add Accounts

What type of account is this?

Cash	Investment
Insurance	Liability
Stock Option	Note Receivable

Accounts added from here will not be automatically updated.

[Previous Step](#) [Cancel](#)

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

[Go back to Accounts](#)

Add Accounts

What type of investment is this?

529 Plan	Health Savings Account	Roth IRA
529 Plan	Health Savings Account	Roth IRA
Annuity	Qualified Retirement	Taxable Investment
Fixed Variable	IRA Money Purchase Other Pension Profit Sharing Roth 401(k) Roth 403(b) SEP Traditional 401(k) Traditional 403(b)	Taxable Investment

Accounts added from here will not be automatically updated.

[Previous Step](#) [Cancel](#)

Add Accounts

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

[Go back to Accounts](#)

Taxable Investment

Asset Name	<input type="text" value="Taxable Investment"/>
Institution Name	<input type="text" value="Joanna's Investment Account"/>
Owner	<input type="text" value="Other Heirs"/> + Add
Total Value	<input type="text" value="\$33,000"/>
Holdings Value	<input type="text"/>
Cash Balance	<input type="text"/>
Margin Balance	<input type="text"/>
Tax Basis	<input type="text" value="\$27,500"/>