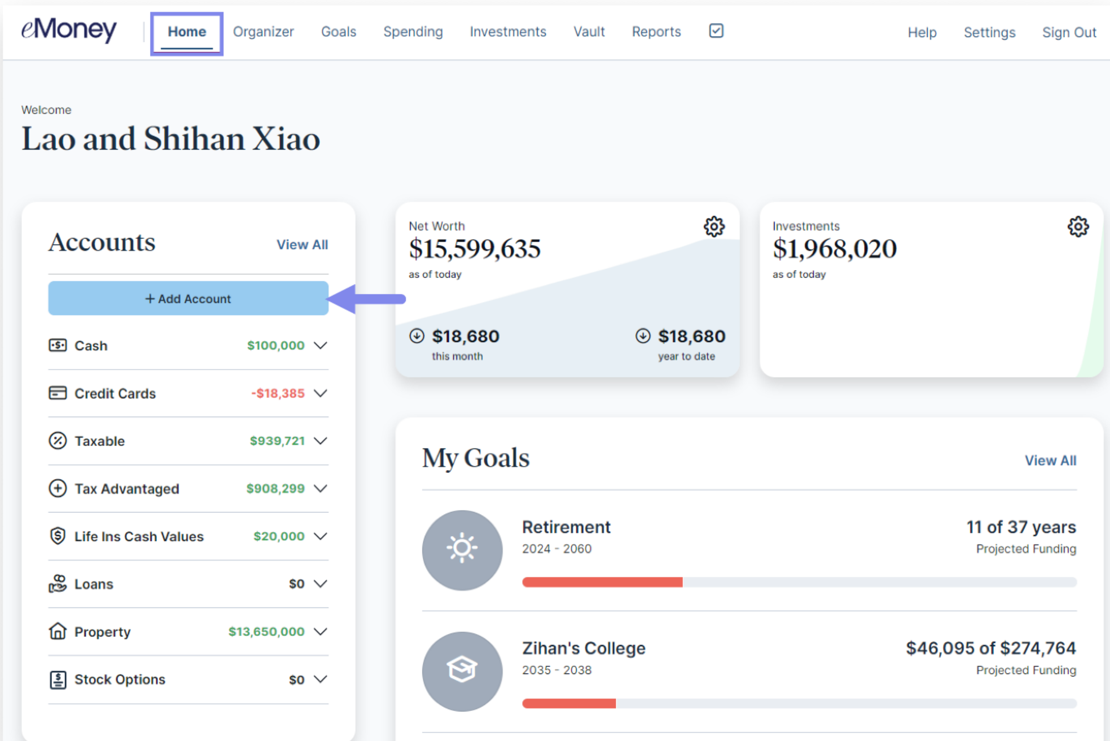
Add Accounts

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

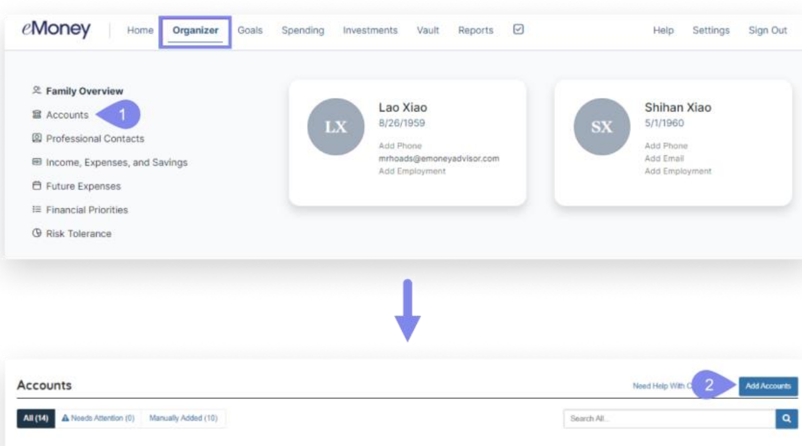
Adding Connected Accounts

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

1. From your Home page, click Add Account.



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



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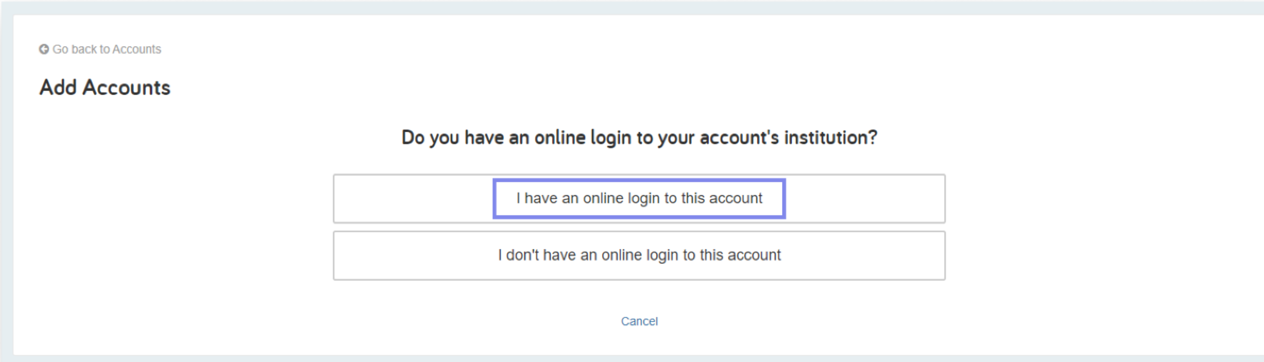
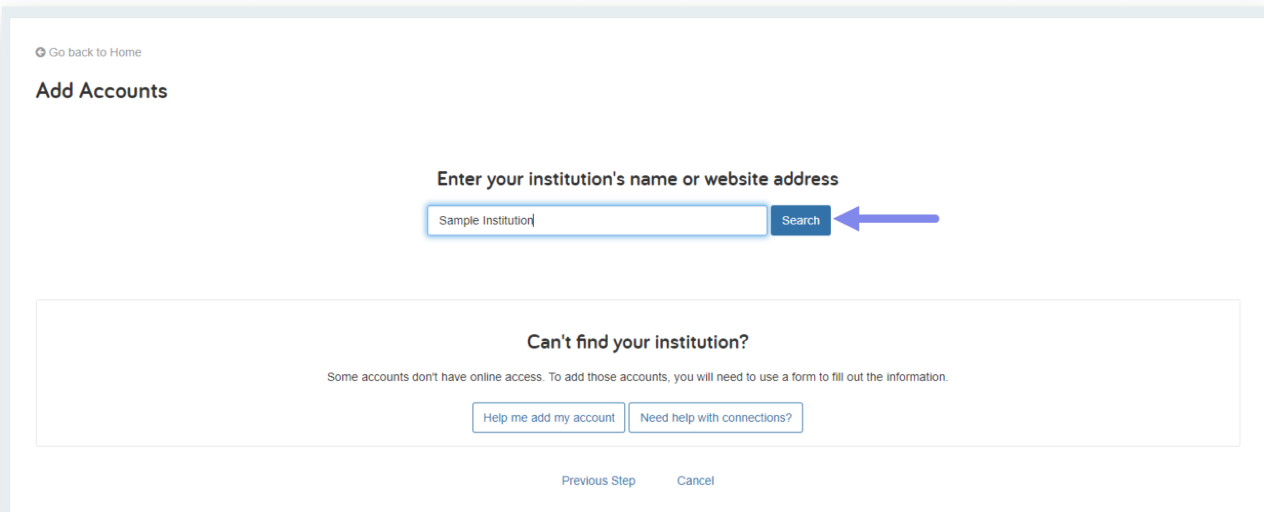
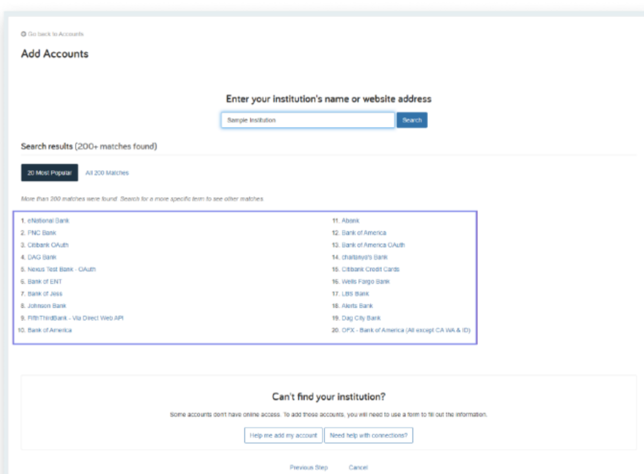
2. Click **I have an online login to this account**. (Manual entry is explained in the next section.)



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



4. Select the connection from the search returns.



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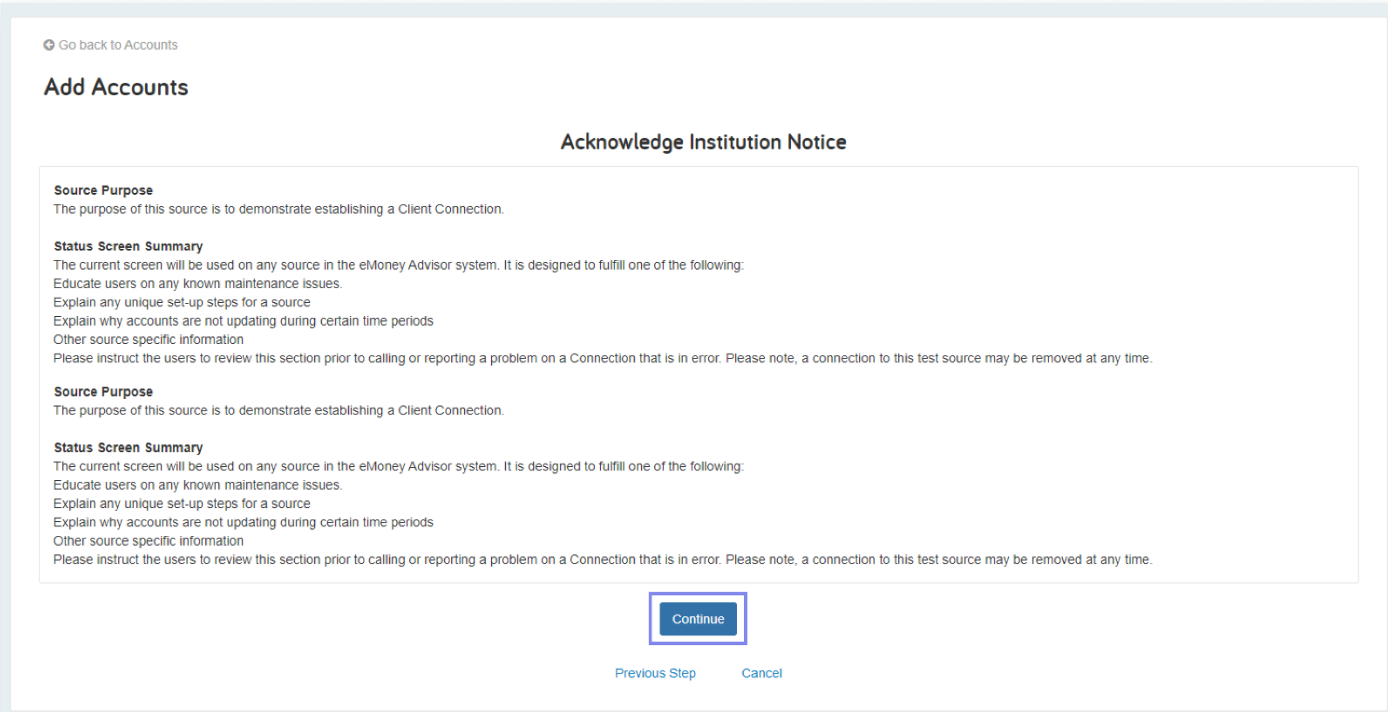
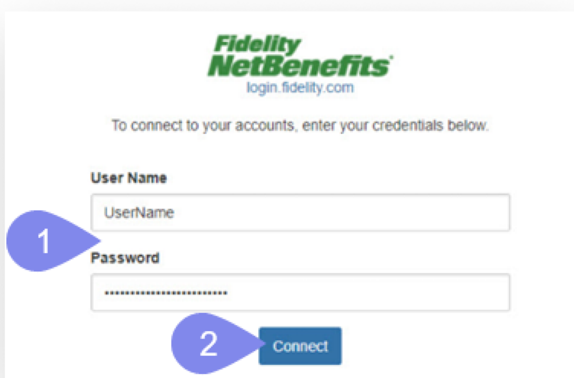
5. If an Acknowledge Institution Notice screen appears, read the notice, and click **Continue**.
   This notice varies by institution and will inform you of any critical information related to this institution's connection.



6. 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.

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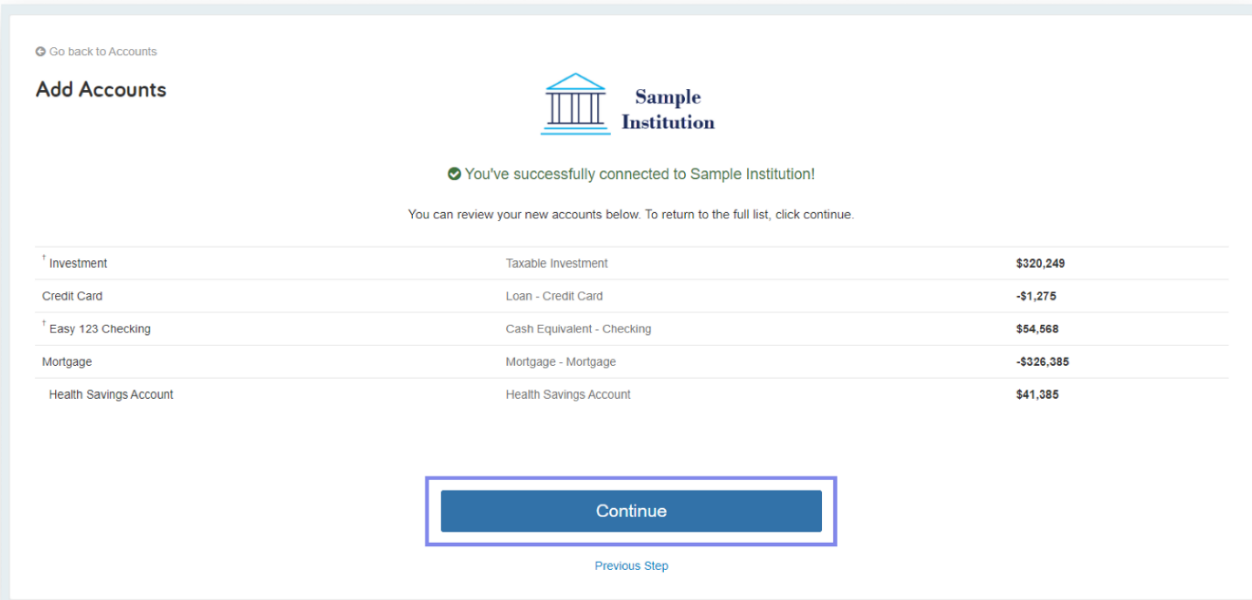
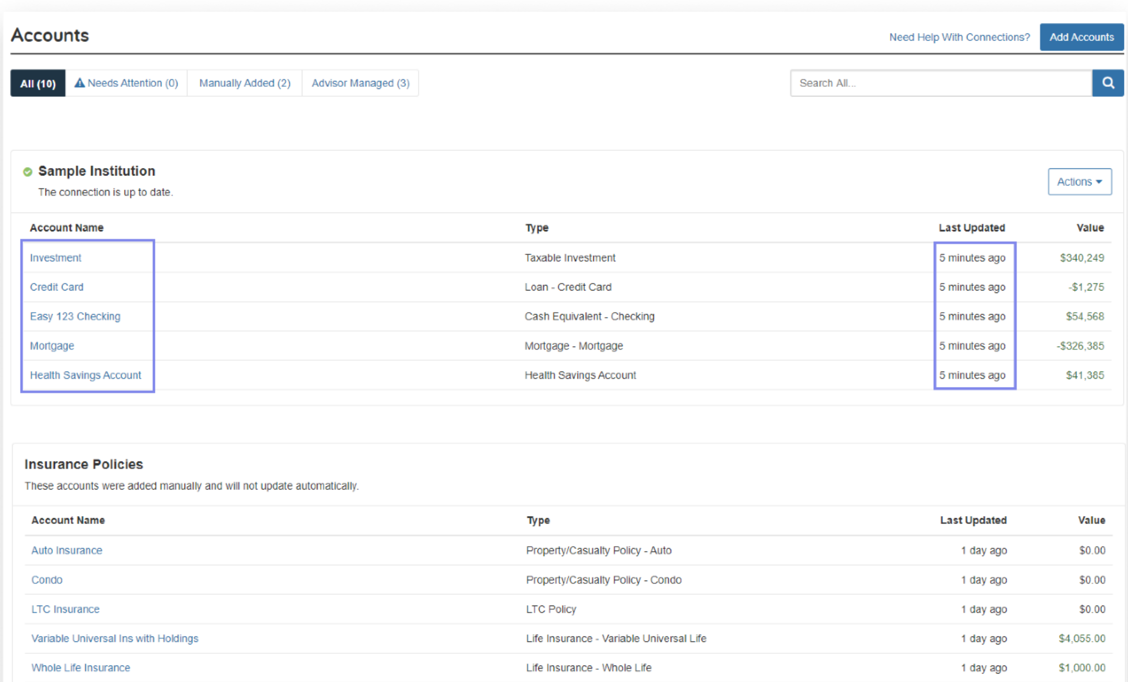
7. Once your credentials have been verified, you can review the accounts brought over through the connection. Click Continue to return to an overview of all accounts you have entered in your portal.



8. 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.

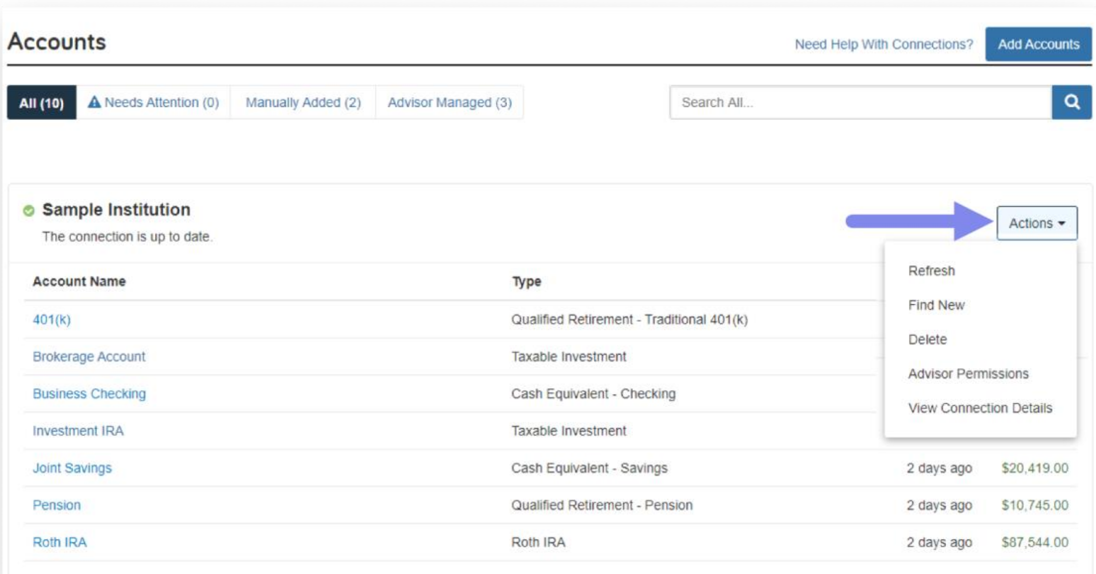


Connection Maintenance

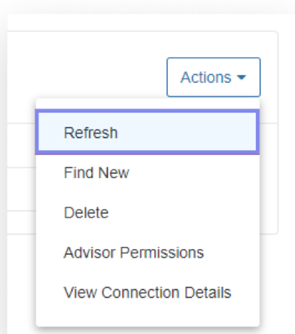
Each connection you establish will require maintenance. For example, if you updated your password at the institution, you would need to update the credentials on the connection in your portal.

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

2. With the **Actions** menu, you can make a handful of selections to manage your Connections:



3. **Refresh** the connection anytime to pull over updated account values manually.



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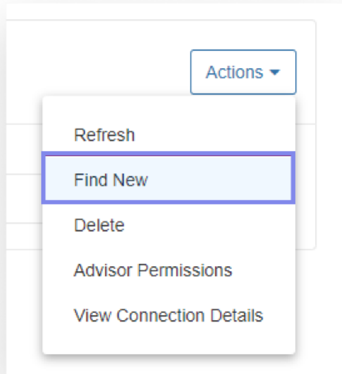
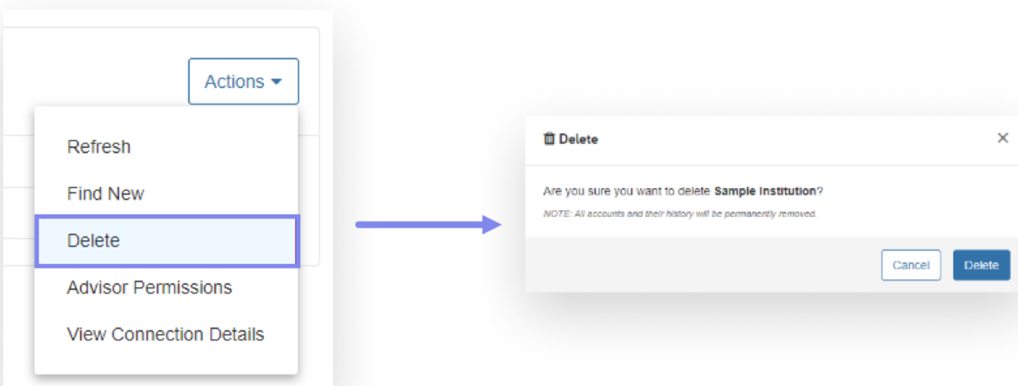
4. Select **Find New** to pull any new accounts opened after establishing the Connection.



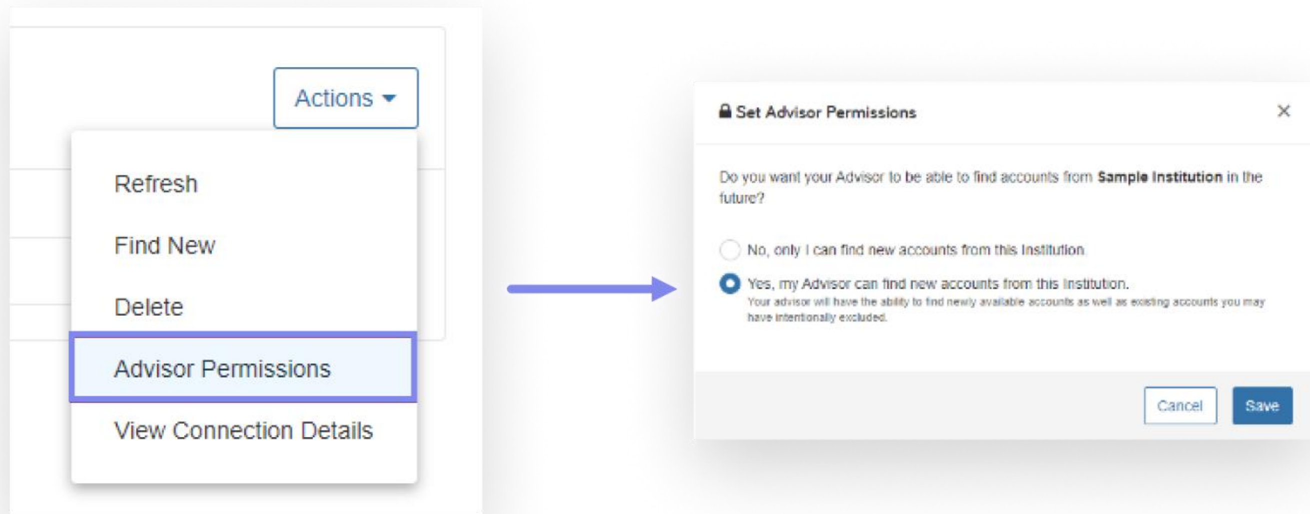
5. Select **Delete** to remove the connection and all associated accounts.



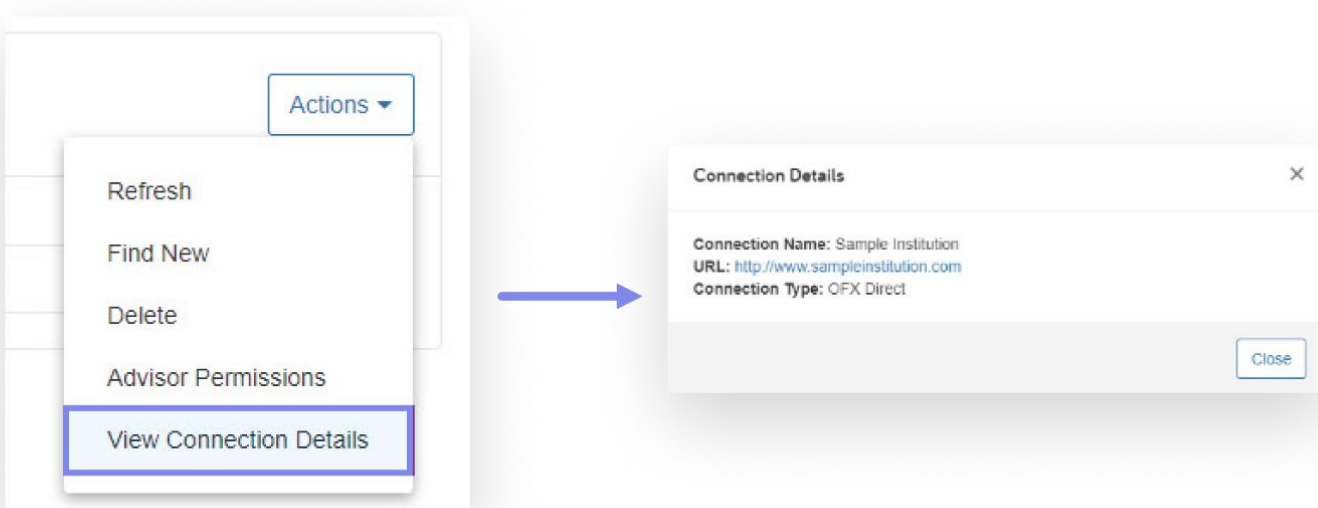
ⓘ **Note**

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.

6. The **Advisor Permissions** selection displays a popup that allows you to enable your Advisor to **Find New** accounts on your behalf.



7. Select **View Connection Details** for the connection name, URL, and Connection Type.



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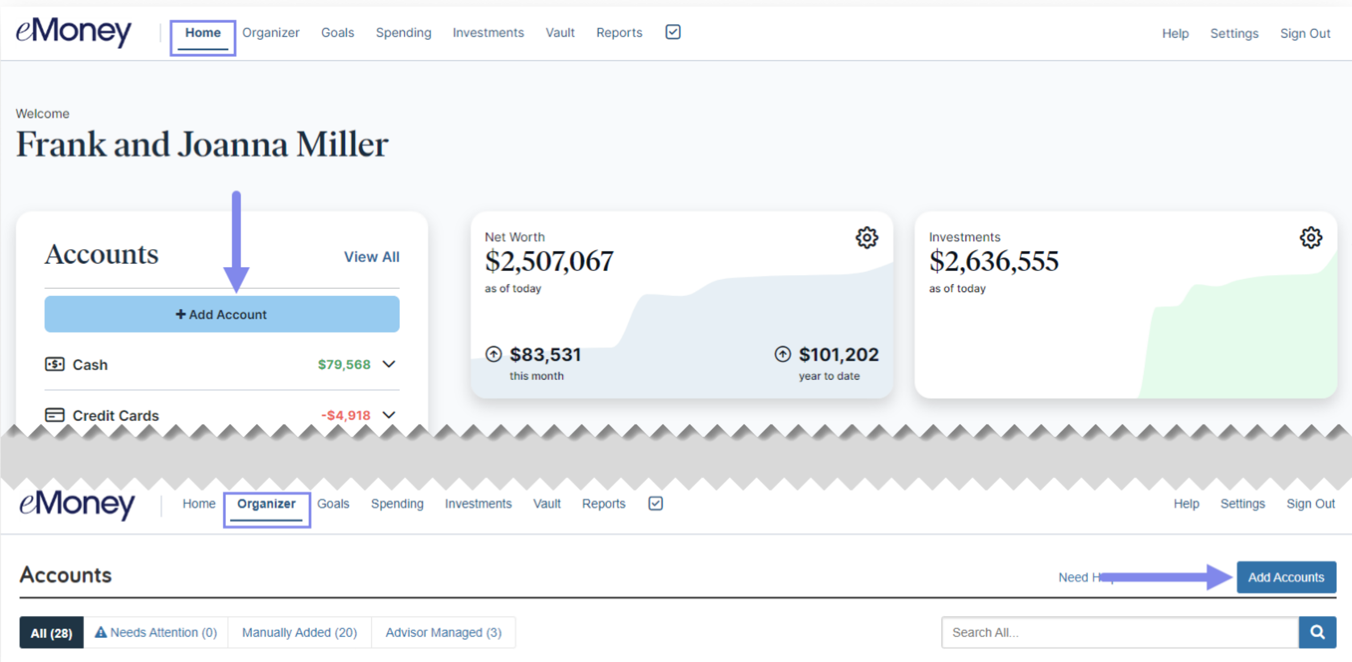
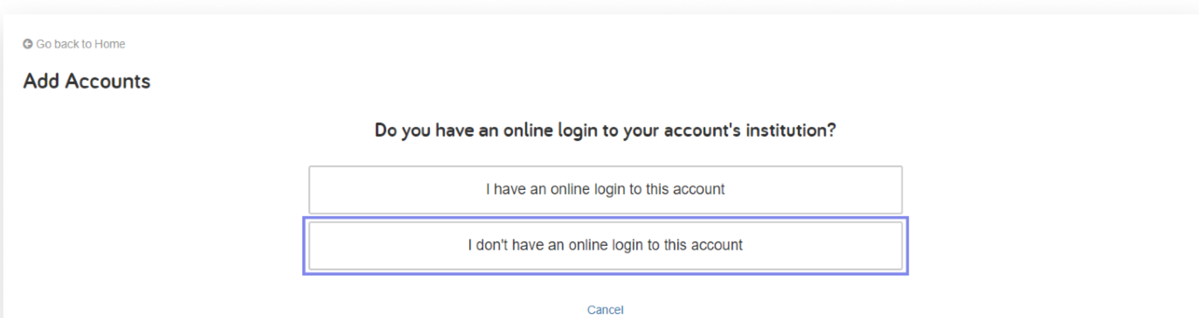
Adding Manual Accounts

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

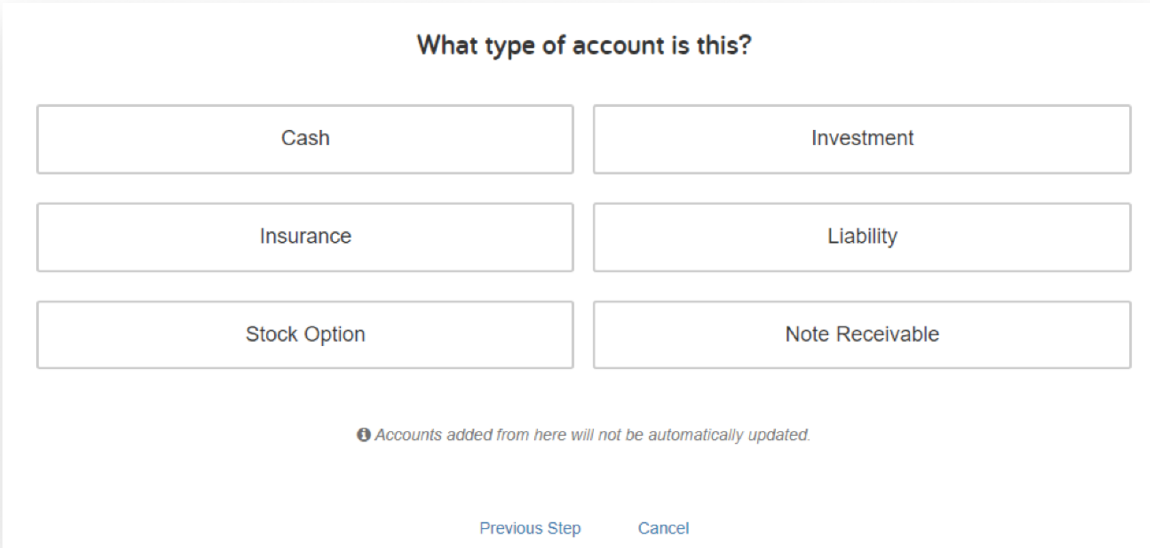


> **Note**
>
> If you do not have the following options, please contact your advisor.

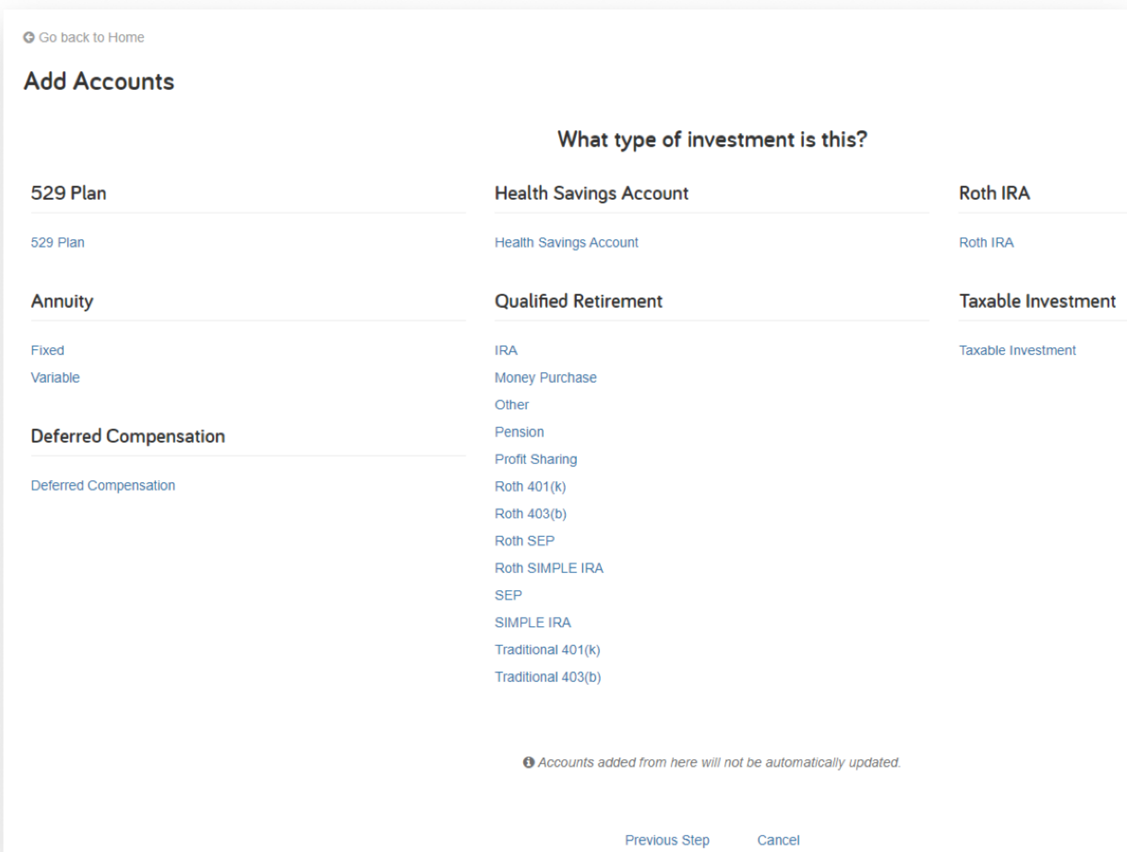
2. Click **I don't have an online login to this account**.



3. Select the type of account.



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



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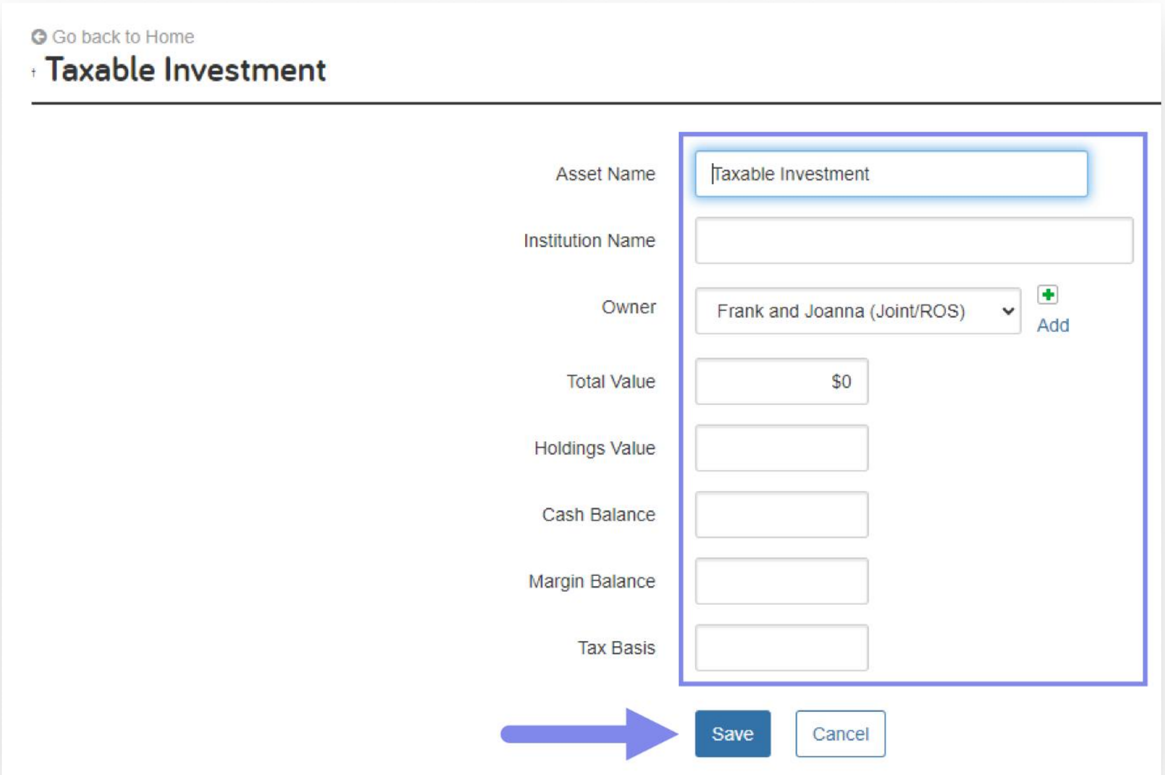
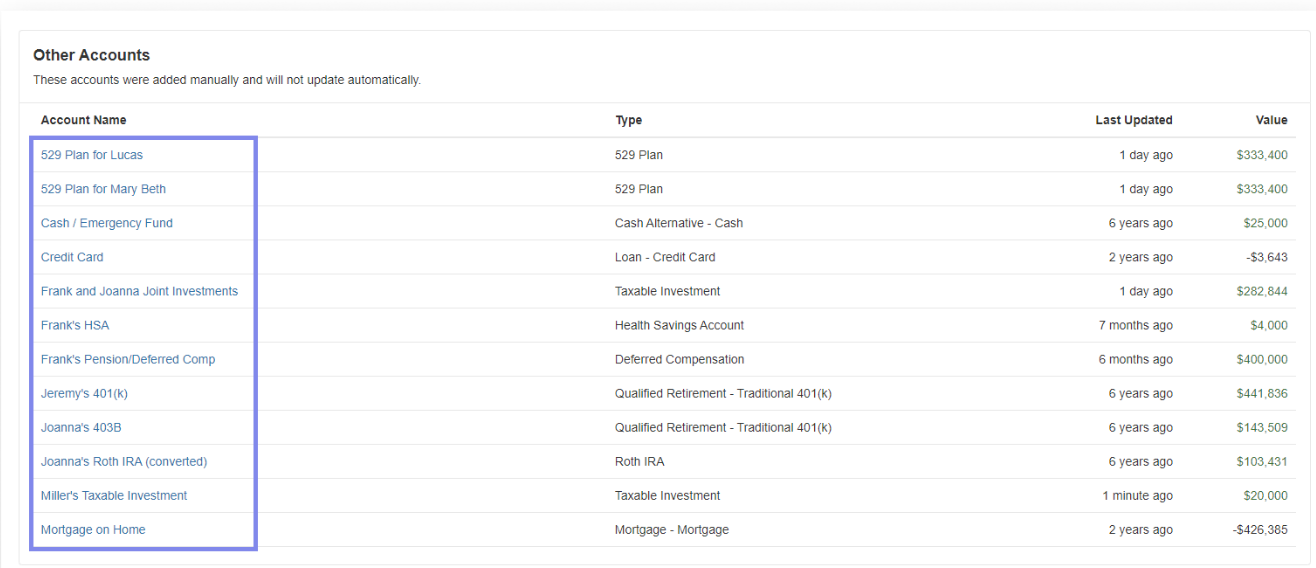
5. Enter details about the account and click **Save.**



6. From the Accounts Page, under Other Accounts, click the **account title.**

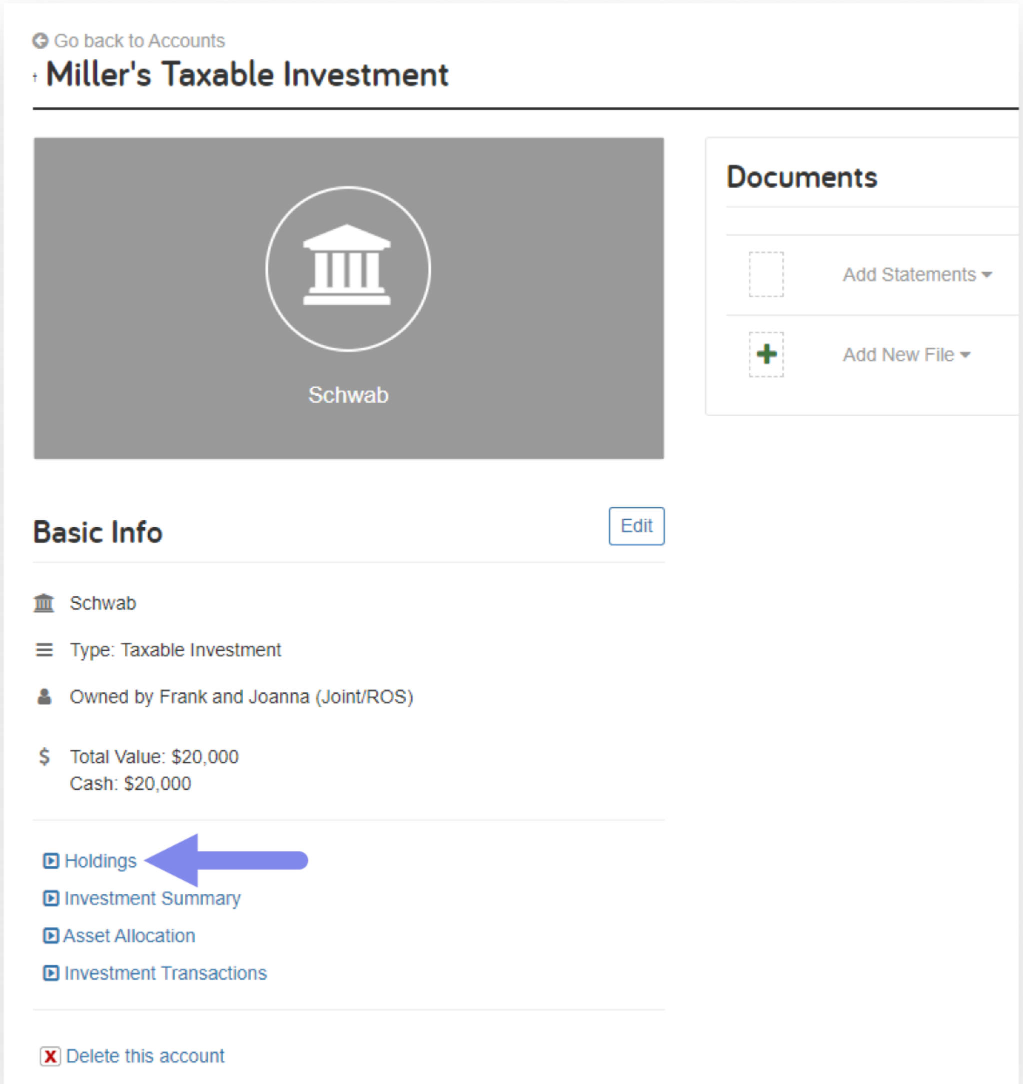


Other Accounts

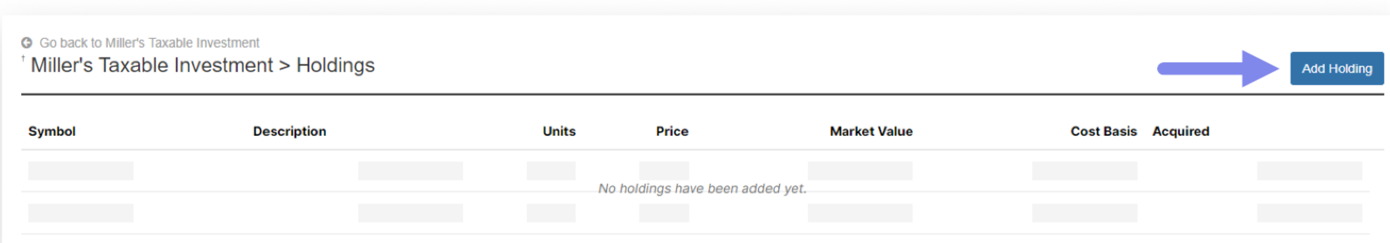
These accounts were added manually and will not update automatically.

Account Name	Type	Last Updated	Value
529 Plan for Lucas	529 Plan	1 day ago	$333,400
529 Plan for Mary Beth	529 Plan	1 day ago	$333,400
Cash / Emergency Fund	Cash Alternative - Cash	6 years ago	$25,000
Credit Card	Loan - Credit Card	2 years ago	-$3,643
Frank and Joanna Joint Investments	Taxable Investment	1 day ago	$282,844
Frank's HSA	Health Savings Account	7 months ago	$4,000
Frank's Pension/Deferred Comp	Deferred Compensation	6 months ago	$400,000
Jeremy's 401(k)	Qualified Retirement - Traditional 401(k)	6 years ago	$441,836
Joanna's 403B	Qualified Retirement - Traditional 401(k)	6 years ago	$143,509
Joanna's Roth IRA (converted)	Roth IRA	6 years ago	$103,431
Miller's Taxable Investment	Taxable Investment	1 minute ago	$20,000
Mortgage on Home	Mortgage - Mortgage	2 years ago	-$426,385

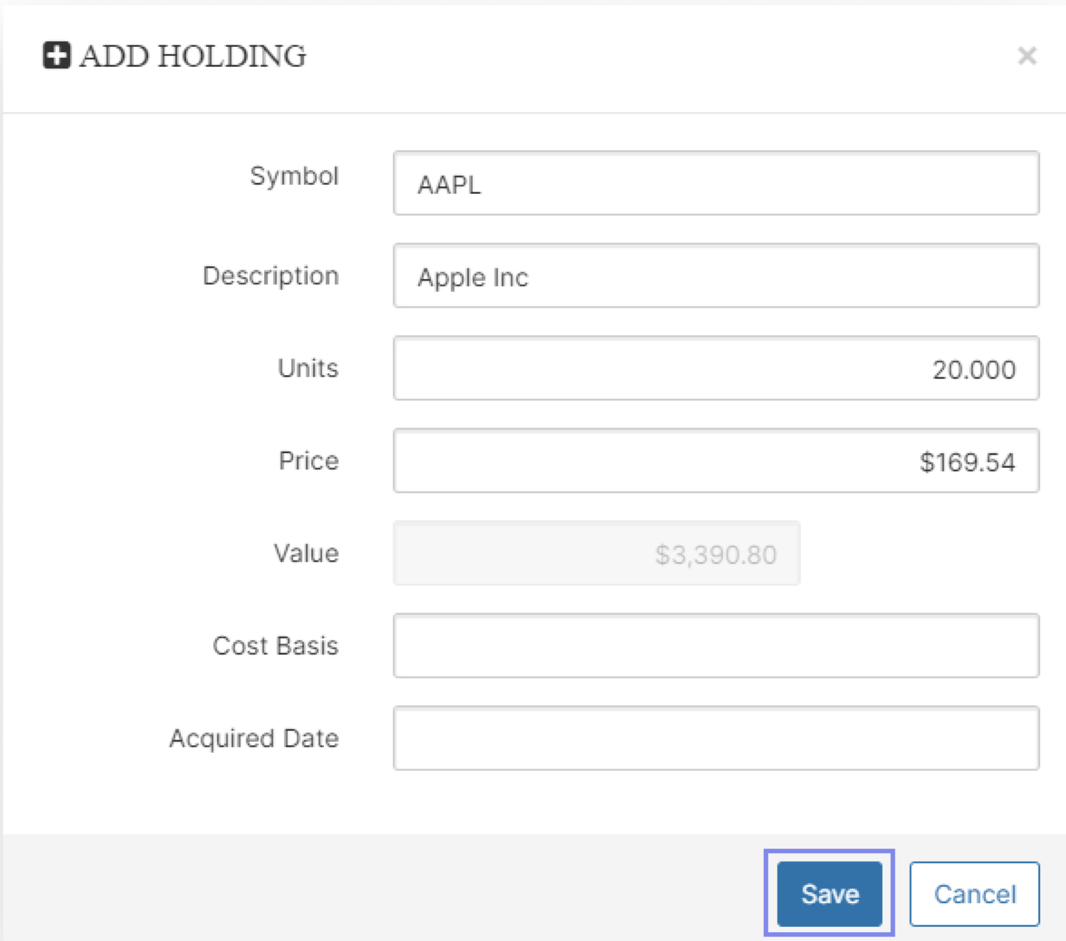
7. Click **Holdings.**



8. Click **Add Holding.**



9. For publicly traded holdings, enter the respective **ticker or CUSIP**. Press the **tab** key 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.