

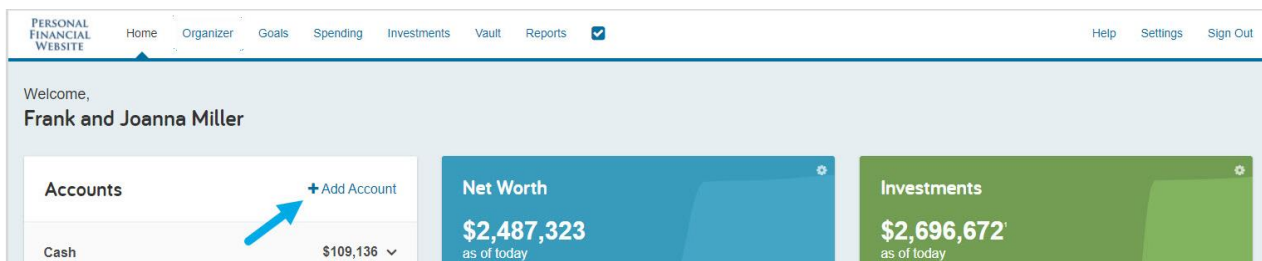
# Add Accounts

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

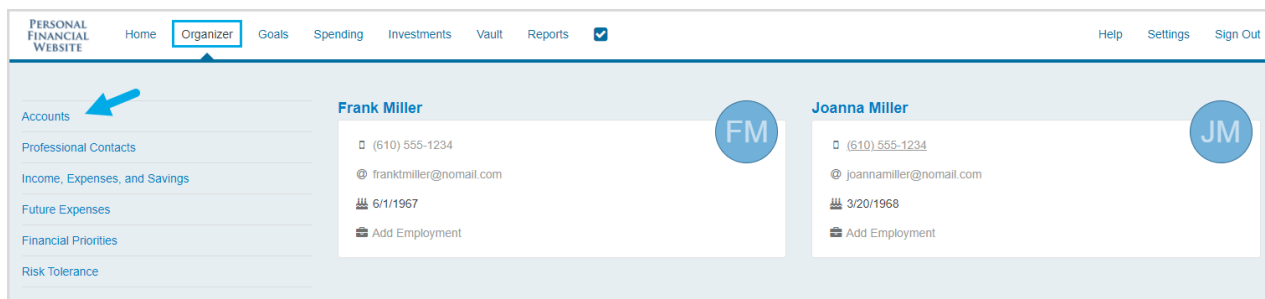
Establishing connections to your personal banking institutions will allow your account information to be updated automatically. You can enter your accounts manually if you do not have an online login to an institution. While manual accounts do NOT update, they help build a better financial snapshot for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

## Adding Connected Accounts

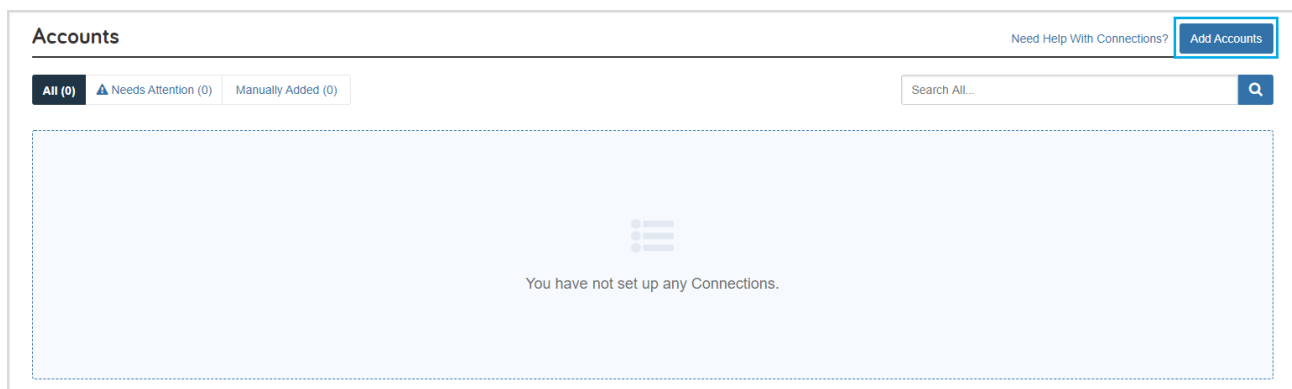
1. From your Home page, click **Add Account**.



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'

Search

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

Search results (11 matches found)

1. [Sample Institution](#)

6. 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.

# 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 the header, there are filter tabs: 'All (26)', 'Needs Attention (1)', and 'Manually Added (20)'. A search bar labeled 'Search All...' is also present. The main content area features a table of accounts with the following data:

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 required maintenance. For example, if you updated your password at the institution, you will need to 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.

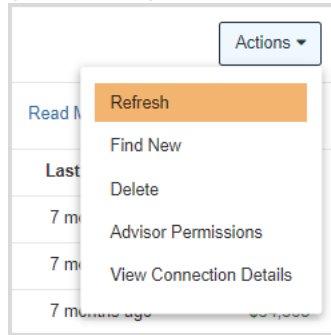
This screenshot shows an account in an error state. The header for 'Sample Institution' has a red background and a warning icon. Below the header, a message reads: 'The institution rejected your credentials.' A blue arrow points to a 'Repair' button with a wrench icon. Other elements include an 'Actions' menu, an 'Important Notice' section, and a message at the bottom: 'No accounts found. Please click 'Repair' above to resolve the error and get your account data.'

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

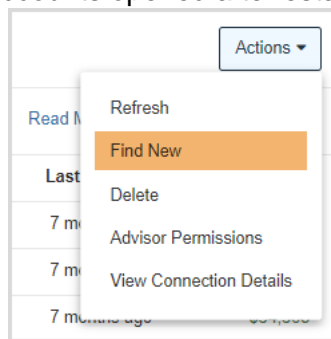
This screenshot shows the 'Actions' menu for an account. A blue arrow points to the 'Actions' dropdown button. The menu is open, showing the following options: 'Refresh', 'Find New', 'Delete', 'Advisor Permissions', and 'View Connection Details'. The background shows the same account table as in the previous screenshot.

# Add Accounts

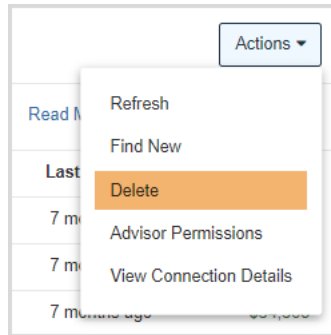
1. **Refresh** the connection anytime to pull over updated account values manually.



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



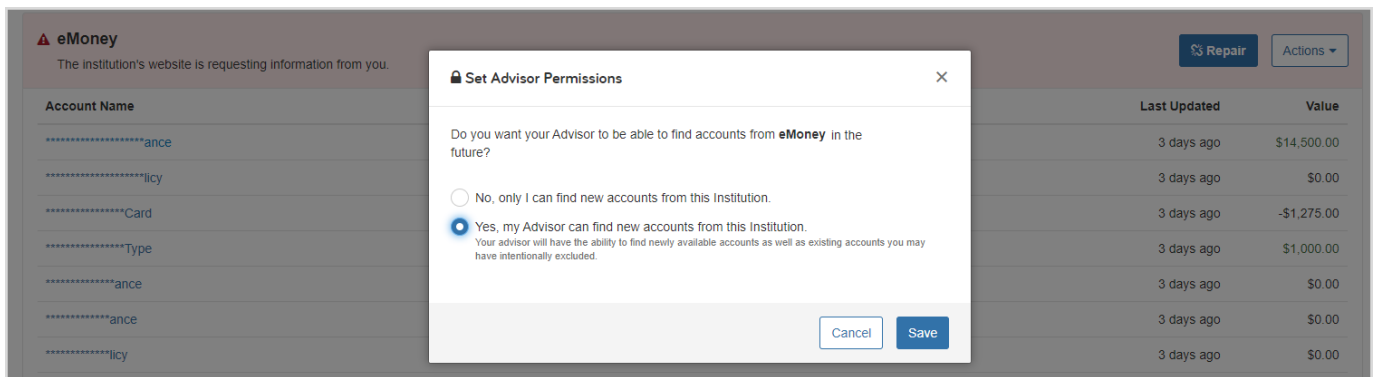
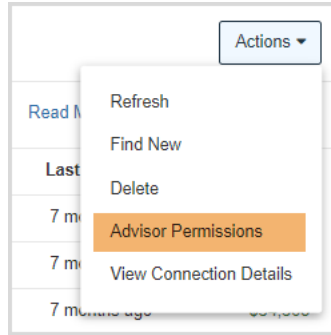
3. Select **Delete** to remove the connection and all associated accounts.



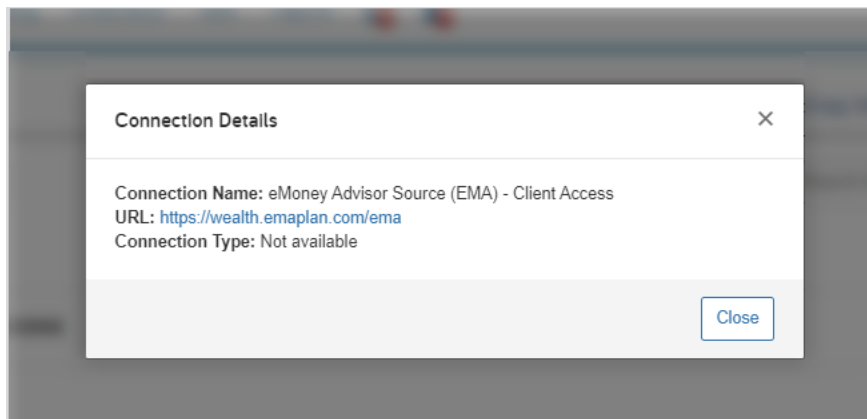
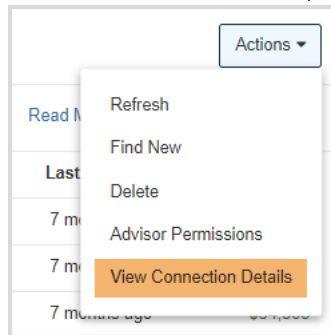
**Note:** If you **Delete** the Connection, you will lose all accounts and transaction history. This is not recommended unless the connection and its accounts are no longer needed.

# Add Accounts

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



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



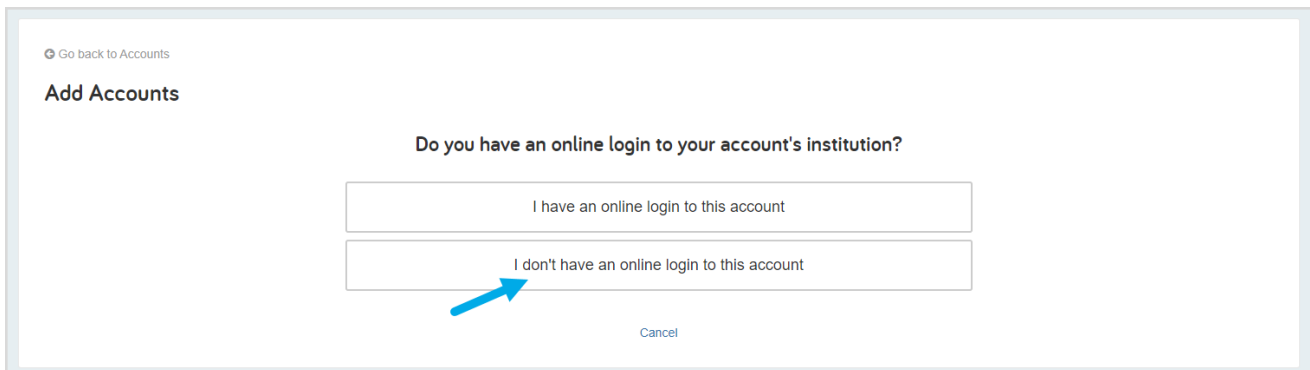
# Add Accounts

## Adding Manual Accounts

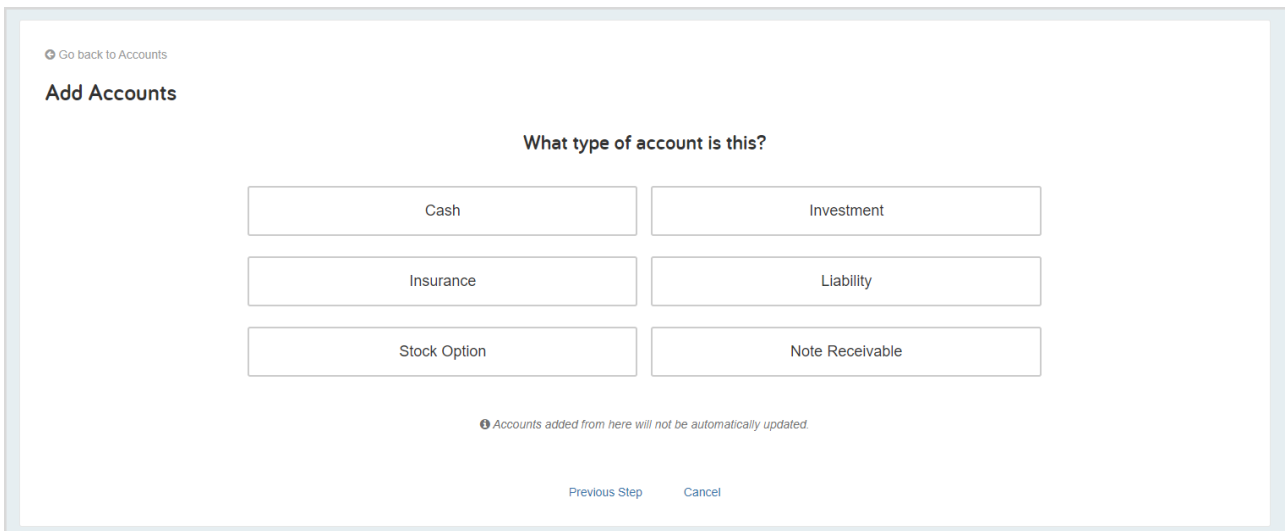
1. Click **Add Accounts** on the Accounts page.



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



3. Select the type of account.



# Add Accounts

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	IRA	Taxable Investment
Variable	Money Purchase	
	Other	
Deferred Compensation	Pension	
Deferred Compensation	Profit Sharing	
	Roth 401(k)	
	Roth 403(b)	
	SEP	
	Traditional 401(k)	
	Traditional 403(b)	

*Accounts added from here will not be automatically updated.*

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

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"/> <a href="#">Add</a>
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"/>

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