Link Manually Entered Accounts

This training guide demonstrates how to connect your manually entered facts! The process is simple and the guided workflow will help you every step of the way. You will go through this process on an account basis. There are many benefits to connecting your accounts, the most important being able to have up-to-date access to account balances and information! To begin, log in to your Personal Financial Website.

1. From your Home page, scroll to the **Accounts** tile. If you see a section with a yellow notification icon, click to expand. Any manually entered facts will have a **Link Account** button to begin the workflow!

	Home	Organizer	Workshop	Spending	Investments	Vault	Reports			
Welcome, Client										
Account	5		+	Add Account	Ne	et Wort	h		•	Investment
Cash			\$	13,000 🛕 🔨	as	13,00 of today	0			\$0 [°] as of today
Cash Equivale			As of 5/15/	50 2018 at 11:37a	3 . 7	\$13,000 his month	9		◆ \$3,000 year to date	\$0 ³ Change
Cash Equivale			As of 5/14	\$0 🛕 4/2018 at 3:23pm	50	pending)			

2. After clicking Link Account, you will then be prompted to search for and identify the appropriate financial institution related to that specific account. Search for **Name** or **Website Address**.

Find Institution	2 Select Your Account	3 Link Account
xisting Account Data		Enter Your Institution's Name or Website Address
Account Name Joint Savings Salance (as of 03/08/18 at 4:08 PM) 520,419 Ype Faxable Investment		National Bank We have pre-filled the search form with an institution based on your manual account data. If this institution is incorrect, or does not return any results, you may alter or replace it as needed
		Search Results (2 results found)
		National Bank
		National Bank Legacy HTML

Note: If you previously entered an Institution Name within your Organizer for an account, the application will pre-populate search results based on what you entered!

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3. After selecting the right institution, you will enter your credentials to establish the connection. The institution may prompt for additional verification such as security questions or 2-Factor Authentication.

Connect Account			
1 Find Institution	2 Select Your Account	3 Link Account	
Existing Account Data		Enter Credentials	
Account Name Joint Savings Balance (as of 03/08/18 at 4:08 PM) \$20,419 Type Taxable Investment		User Name User Name Password Password	
		Add a Nickname (optional) Ex. John's eMoney National Bank	-
		Previous	Connect

4. Once the link is established, you will see a list of accounts that you can link to your site. Select the account that matches and click **Continue**.

Connect Accoun	t						
Find Institution	2 Select Your Account	3 Link A	ccount				
Existing Account Data Account Name Joint Savings		Select Acc		ank. Please select the account below that best matches you	ur existing account to c	continue.	
Balance (as of 03/08/18 at 4:08 PM) \$20,419			Account	Туре	Balance		
Type Taxable Investment		0	Business Checking (*****9837)	Taxable Investment	\$2,214	May 10, 2018 11:14 AM	
		0	Joint Checking (*****7591)	Taxable Investment	\$474	May 10, 2018 11:14 AM	
		0	Joint Savings (*****5416)	Taxable Investment	\$20,419	May 10, 2018 11:14 AM	
		0	Personal Cher	Taxable Investment	\$1,766	May 10, 2018 11:14 AM	
		0	Retirement Sa	Taxable Investment	\$10,745	May 10, 2018 11:14 AM	
		Have anoth	er online login to eMoney National Bank? A	Add another eMoney National Bank login now.			
		Previous]				Continu

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5. Finally, if there are any remaining manual accounts to connect you will be prompted to select another account and begin the Connect Account workflow.

🕑 Fin	nd Institution 🛛 🥑 Select Your Acco	unt 📀 Link Account		
0	Your account is now connected. You have 2 accounts left requiring cor	nnection. Select one below to continue.		
	Account	Туре	Institution	Balance
	Personal Checking	Taxable Investment	eMoney National Bank	\$1,766 03/08/18 at 4:08 PM
	Retirement Savings	Taxable Investment	eMoney National Bank	\$10,745 03/08/18 at 4:08 PM