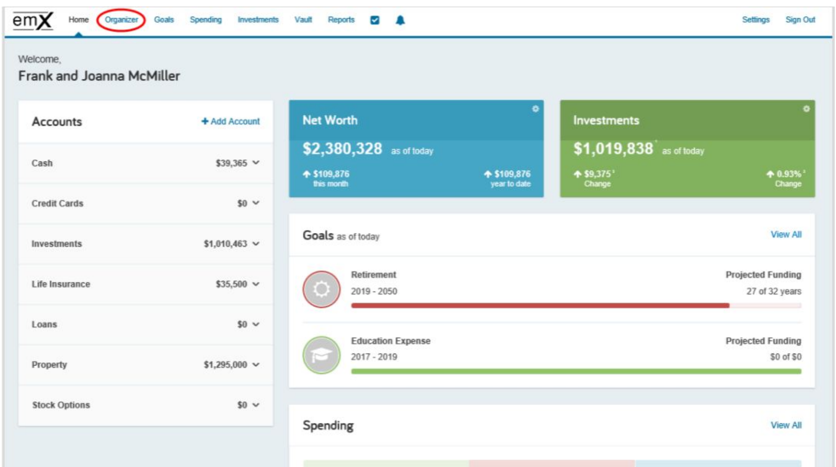
How to link your accounts:

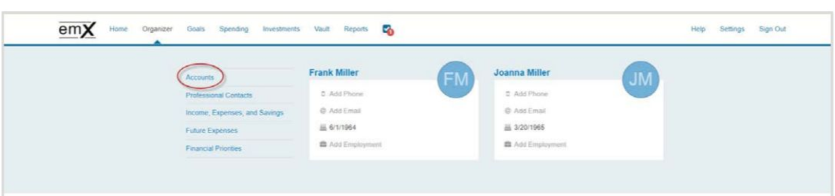
1. [Click here to log into your account](#).

2. From the home page click “Organizer”

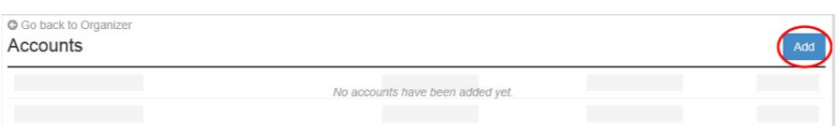


You can also click the +Add Account link from the home page!

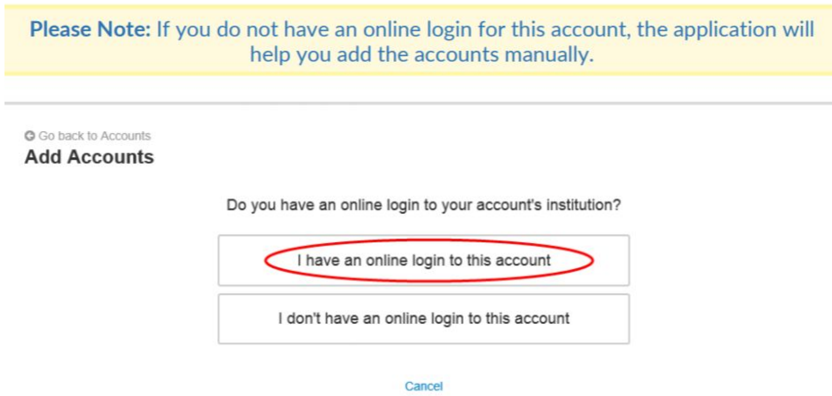
3. Click “Accounts”



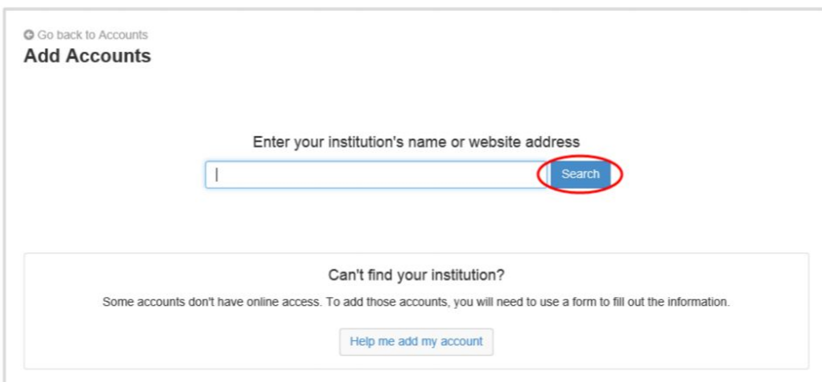
4. Click “Add”



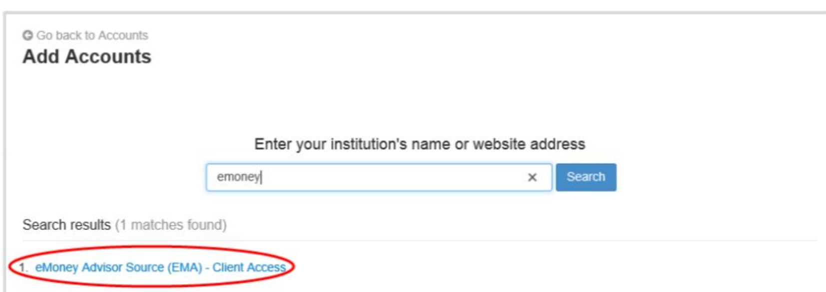
5. Select whether or not you have an online login for this account.



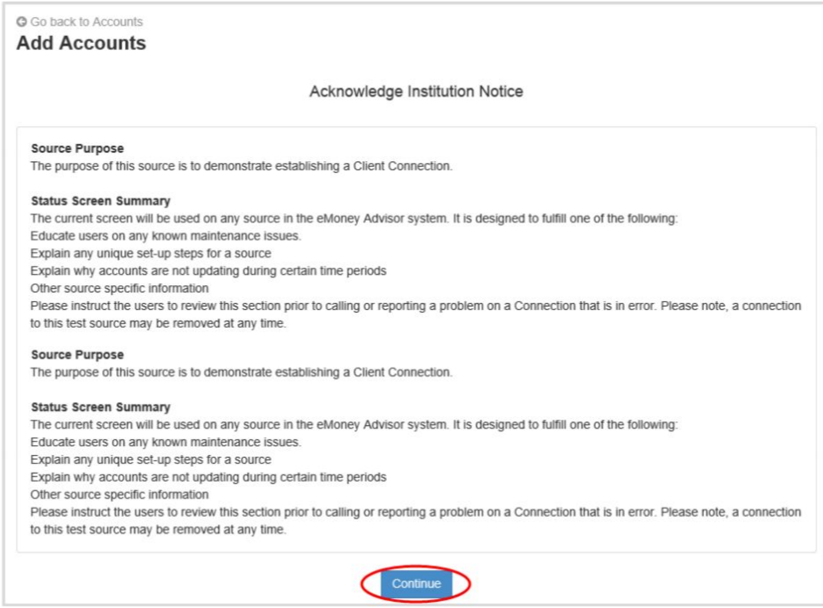
6. Enter the institution’s name or website address and click “Search.”



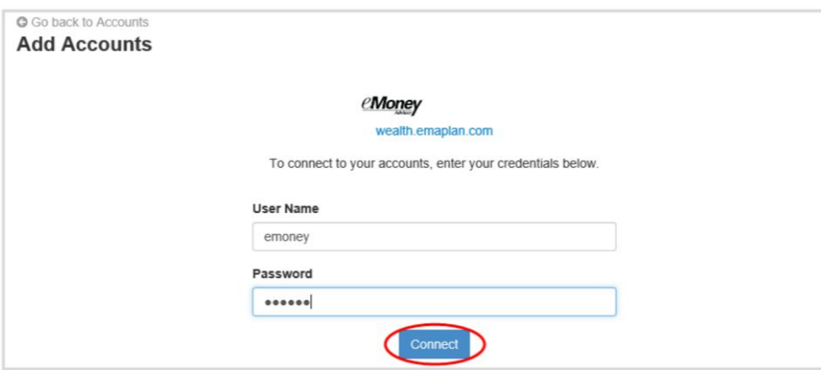
7. From the search results found, select the appropriate link.



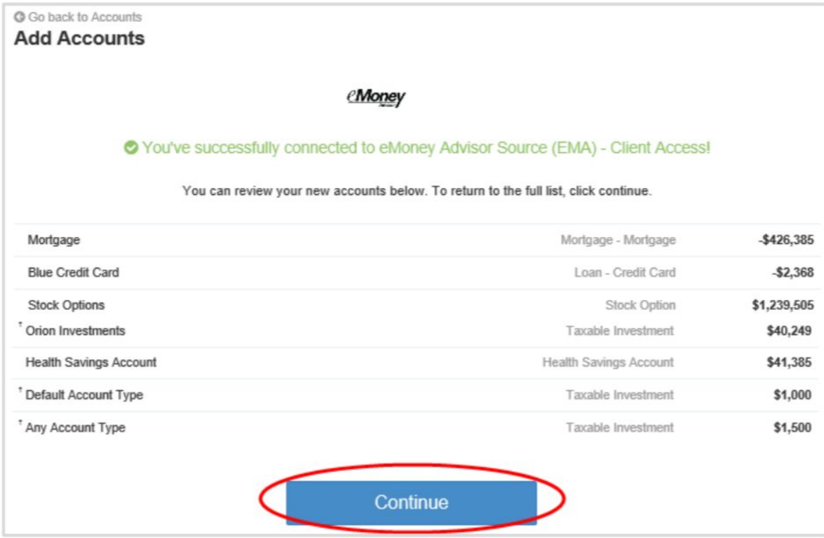
8. Next, you will acknowledge the institution notice where applicable. This notice will inform you of any important information relating to this institution’s connection. Click “Continue.”



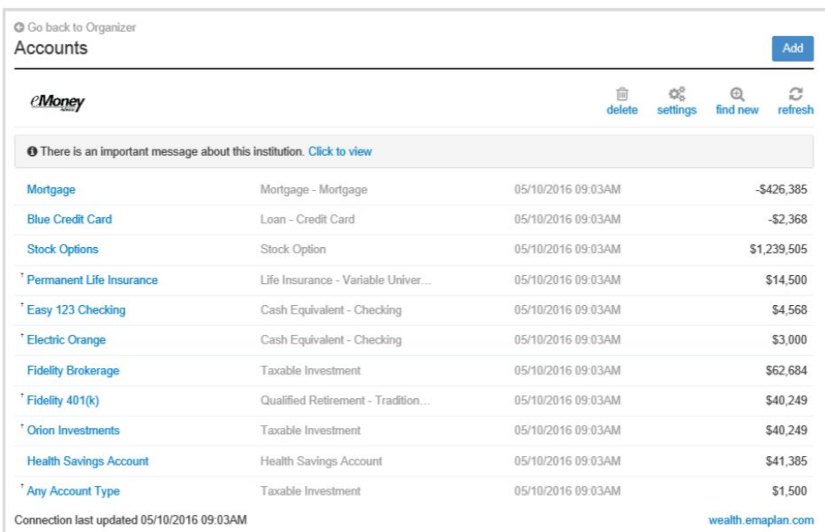
9. Enter in your login credentials for this institution and click “Connect.” If there’s an issue connecting to your accounts, you’ll receive a status message describing the problem. Click on the message to learn how to fix it.



10. 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.

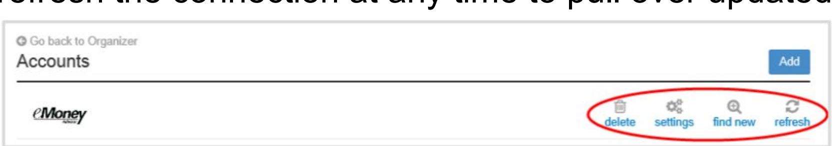


11. On the Accounts page you can easily see when your accounts with an institution last updated or if any accounts are in an errored state.

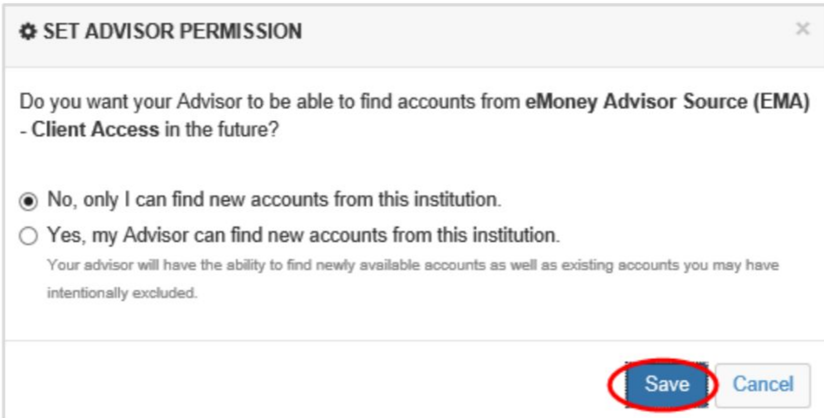


12. Each connection you establish will have its own specific maintenance required. For example, if you updated your password on the institution you will need to then update the credentials in your portal.

You can Delete the connection, change your settings, find new accounts, and refresh the connection at any time to pull over updated account values.



13. The settings link gives you the option to enable your Advisor to find new accounts on your behalf.



All your data is protected by the highest security measures. Click here to see the [technical specifications].