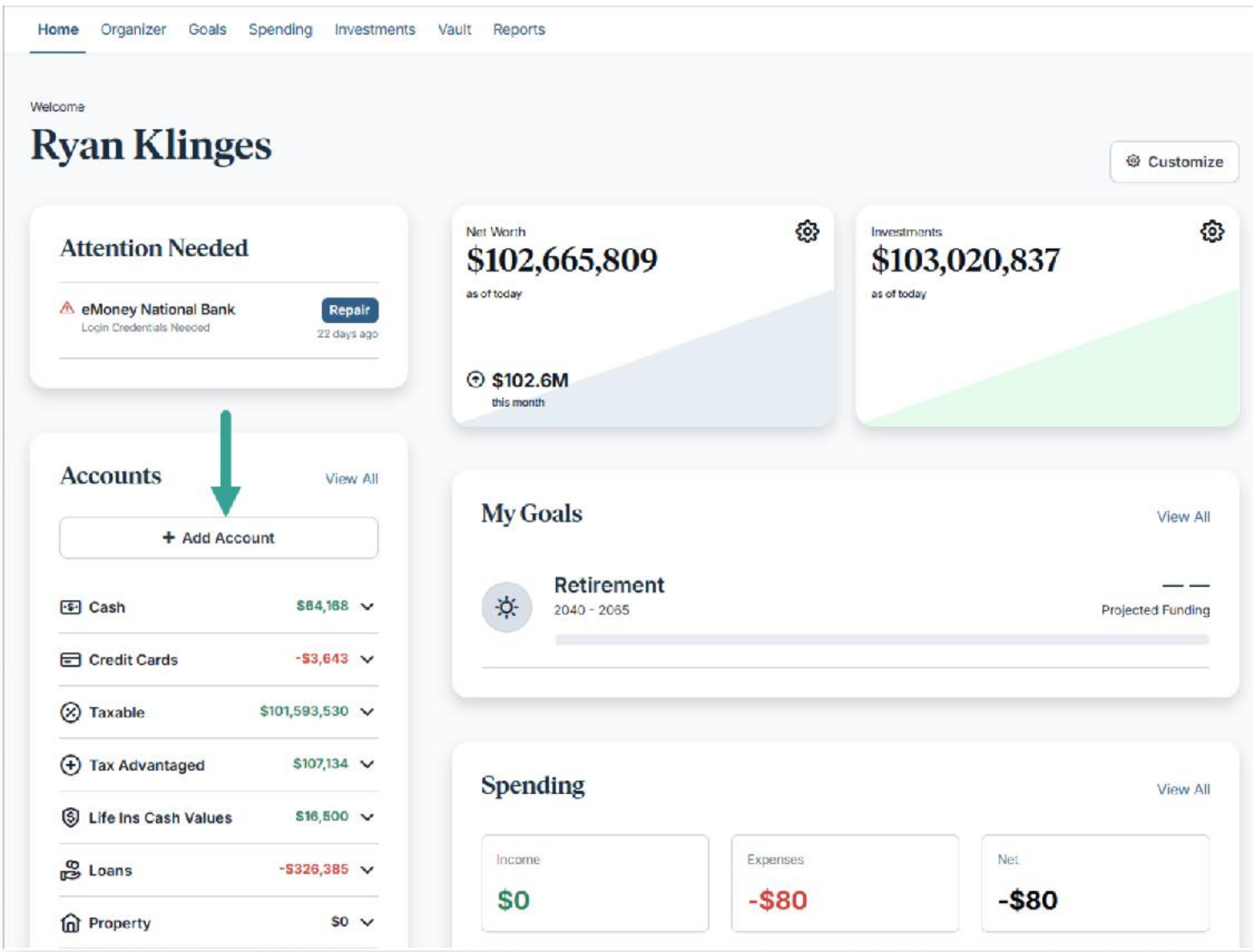
Add Accounts

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

Adding Connected Accounts

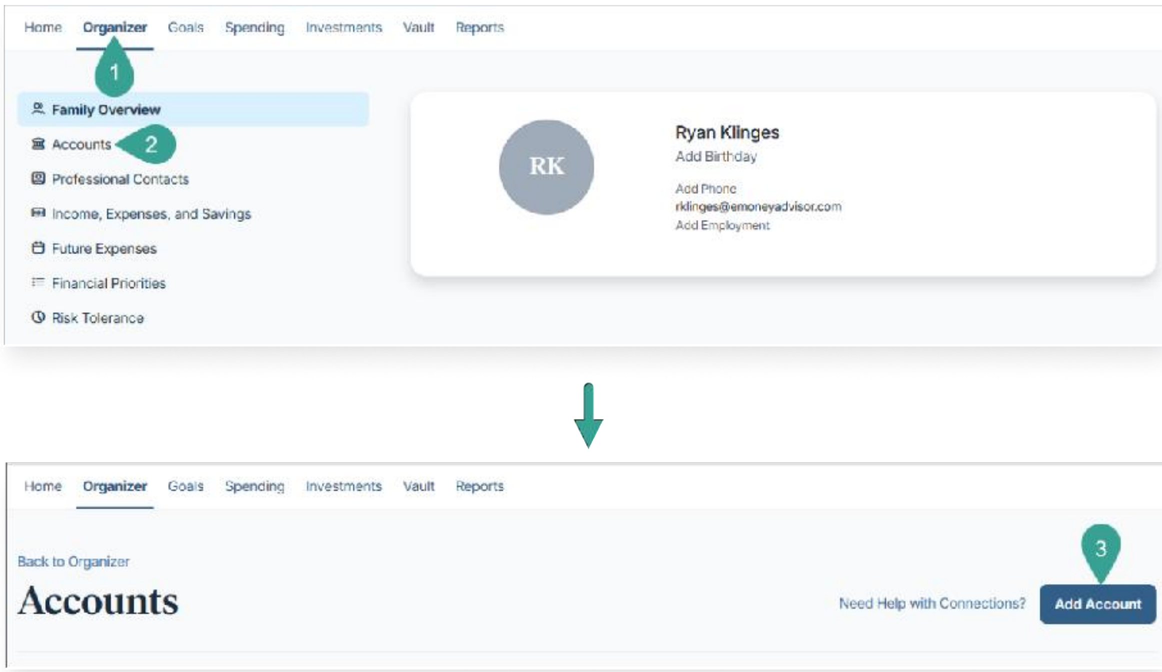
Establishing connections to your personal banking institutions will allow your account information to be updated automatically. If you do not have an online login to an institution, you can enter your account holdings manually.

1. From your Home page, click Add Account.

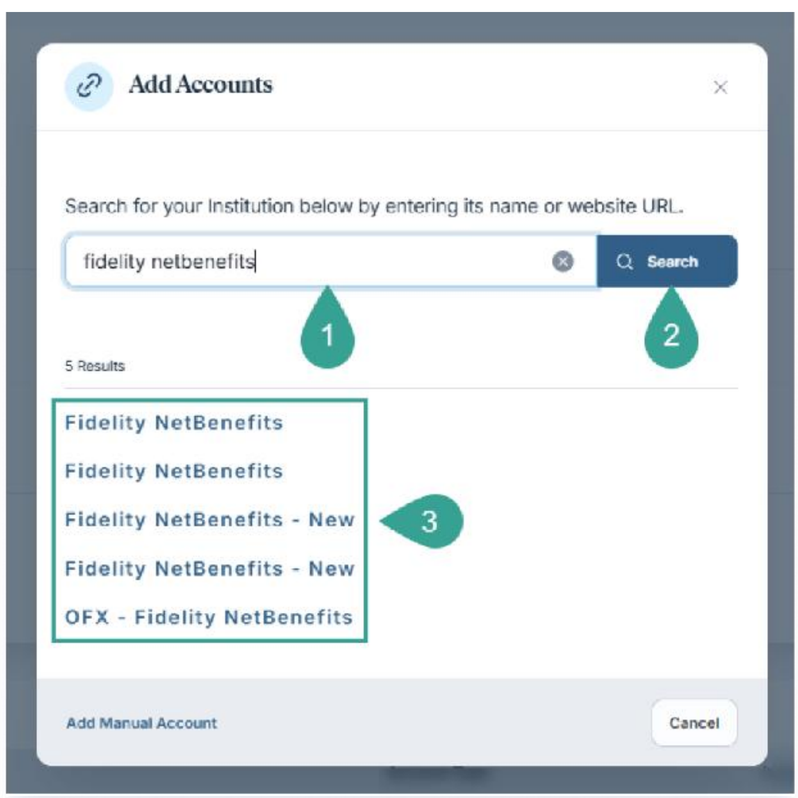


Add Accounts

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



2. Enter the institution name and click Search. Then, select the correct institution name from the list. The manual entry option is explained in the next section.



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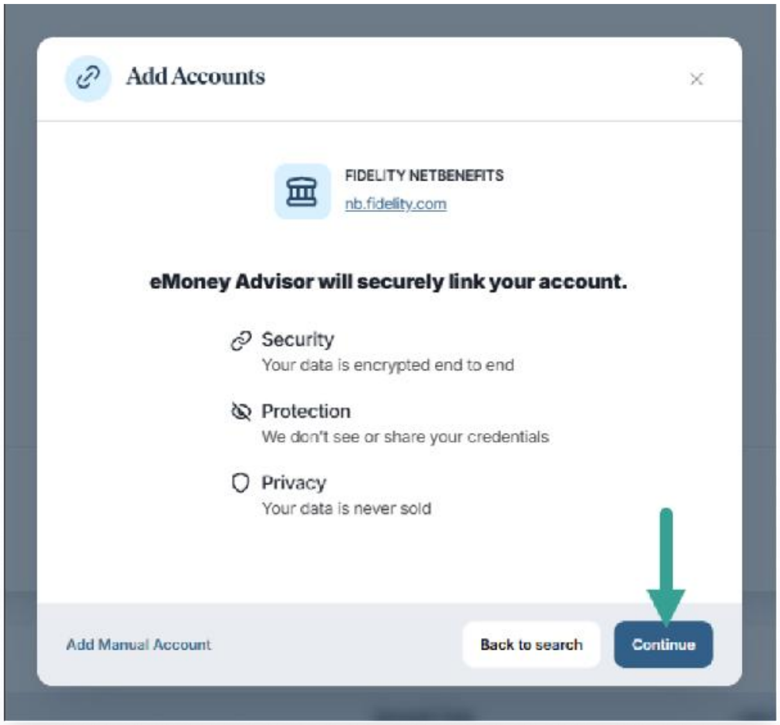
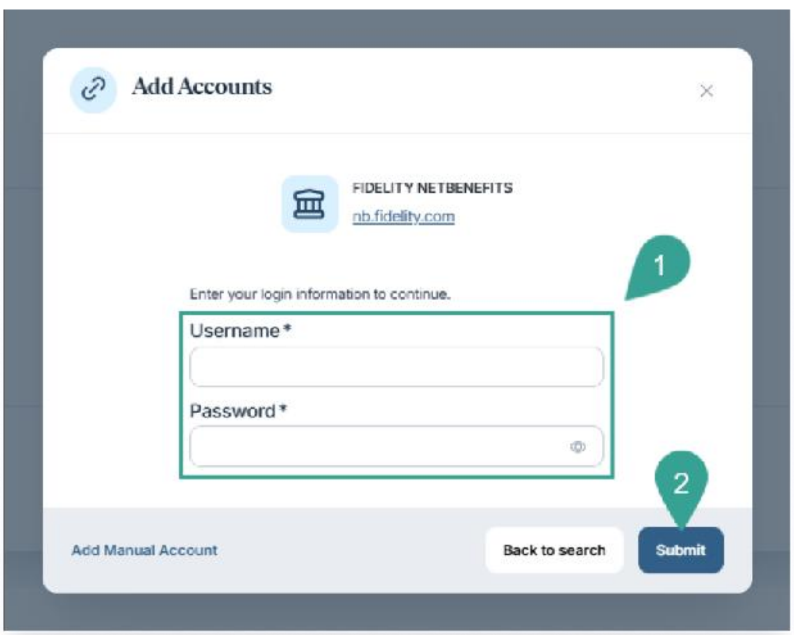
3. Click Continue to authorize data linking.



4. Enter your login credentials for this institution and click Submit.



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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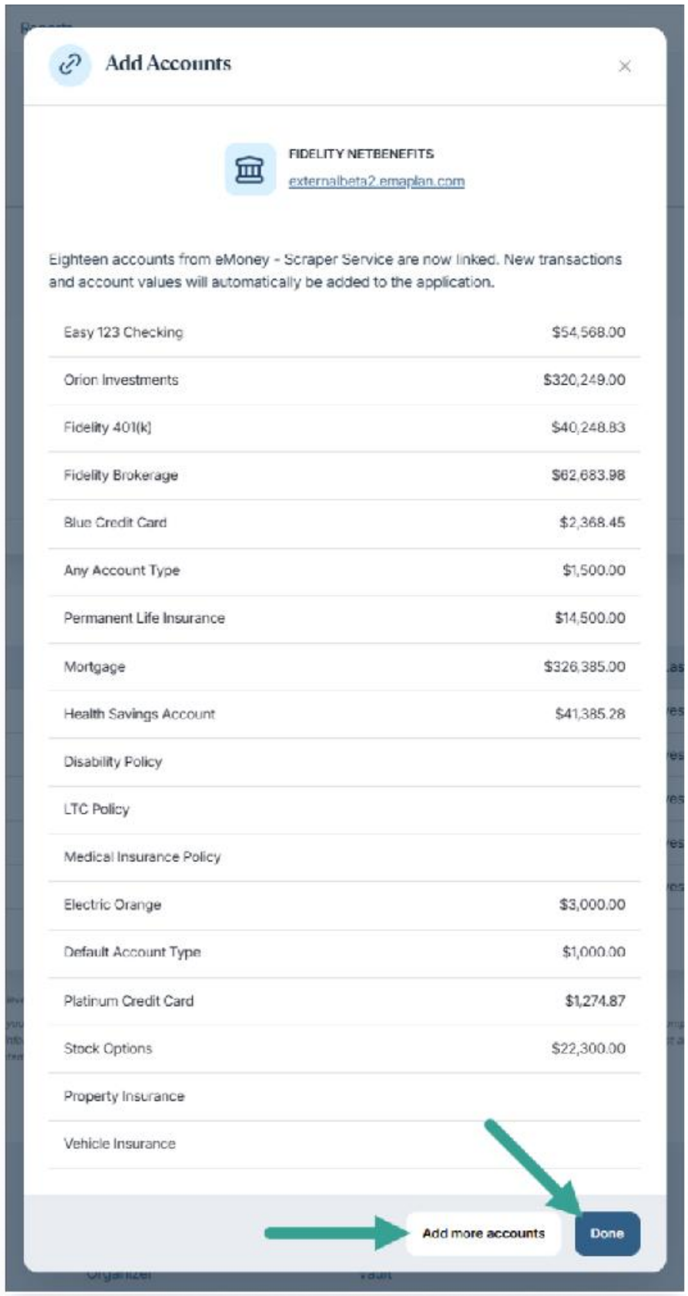
5. Once your credentials have been verified, you can review the accounts brought over through the connection. Click Done to return to an overview of all accounts you have entered in your portal. You can also select to Add more accounts.



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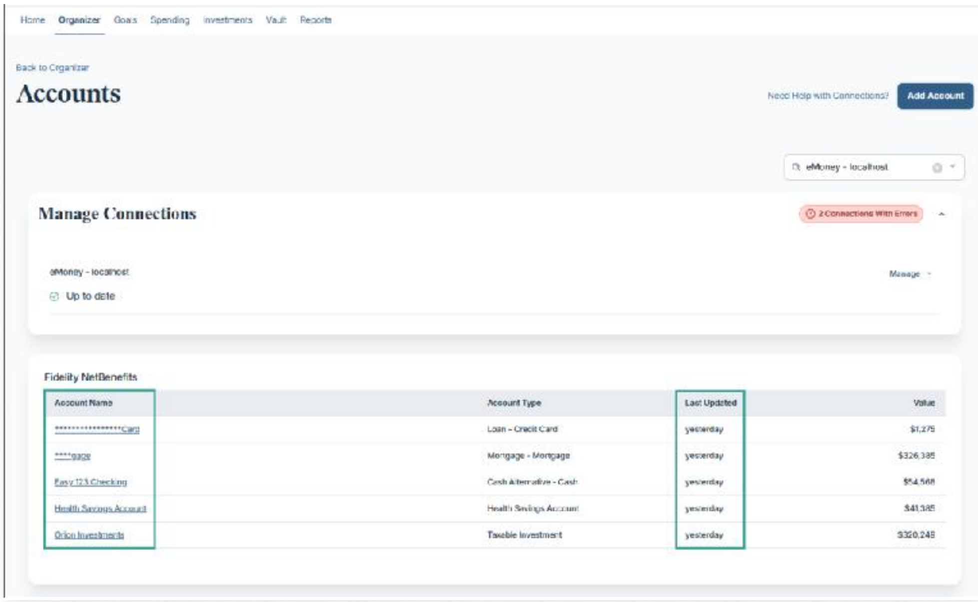
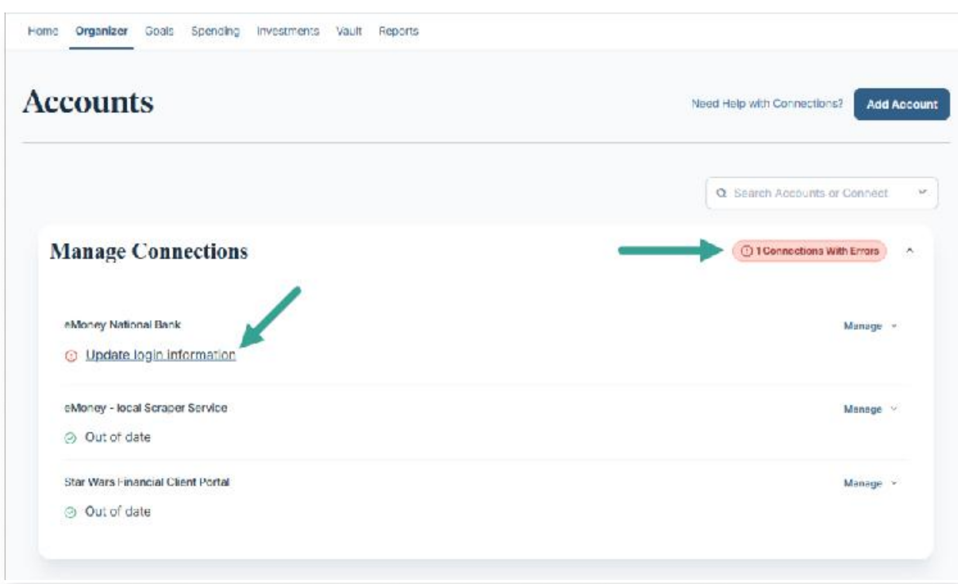
6. On the Accounts page, you can easily see when your accounts with an institution last updated or if any accounts are in an error state.



Connection Management

The Manage Connections section displays each attempted Connection institution and lets you take key actions. 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 you may be able to repair will appear first in the list with their name as a link that you can click to fix the issue.



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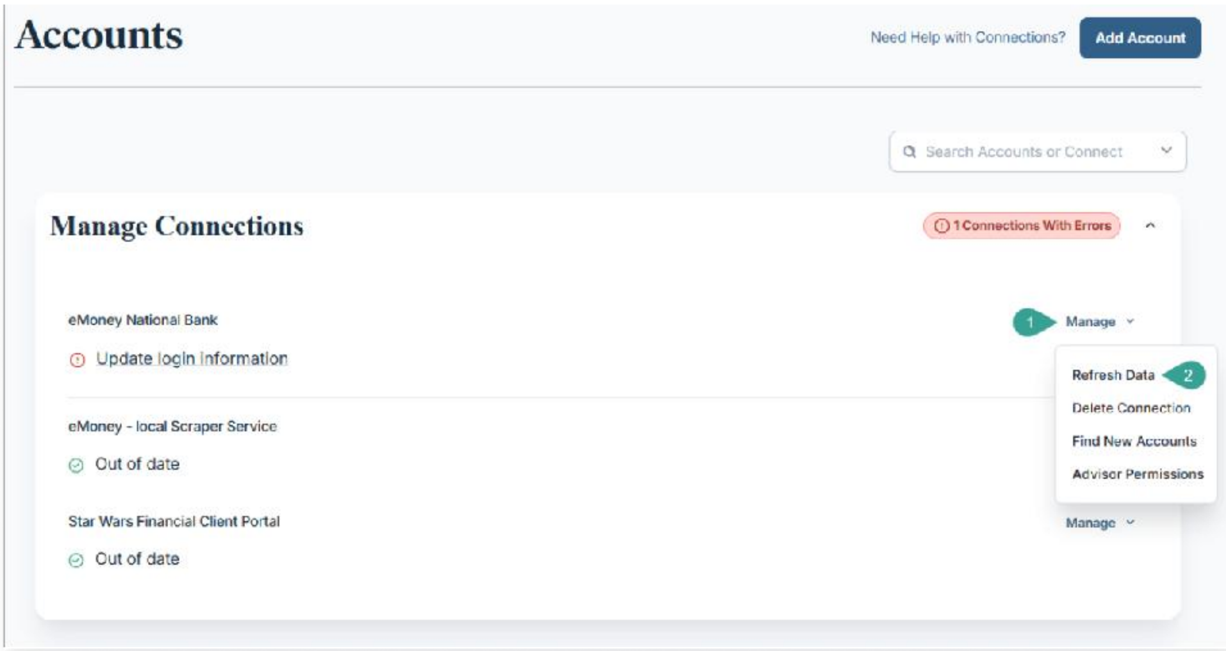
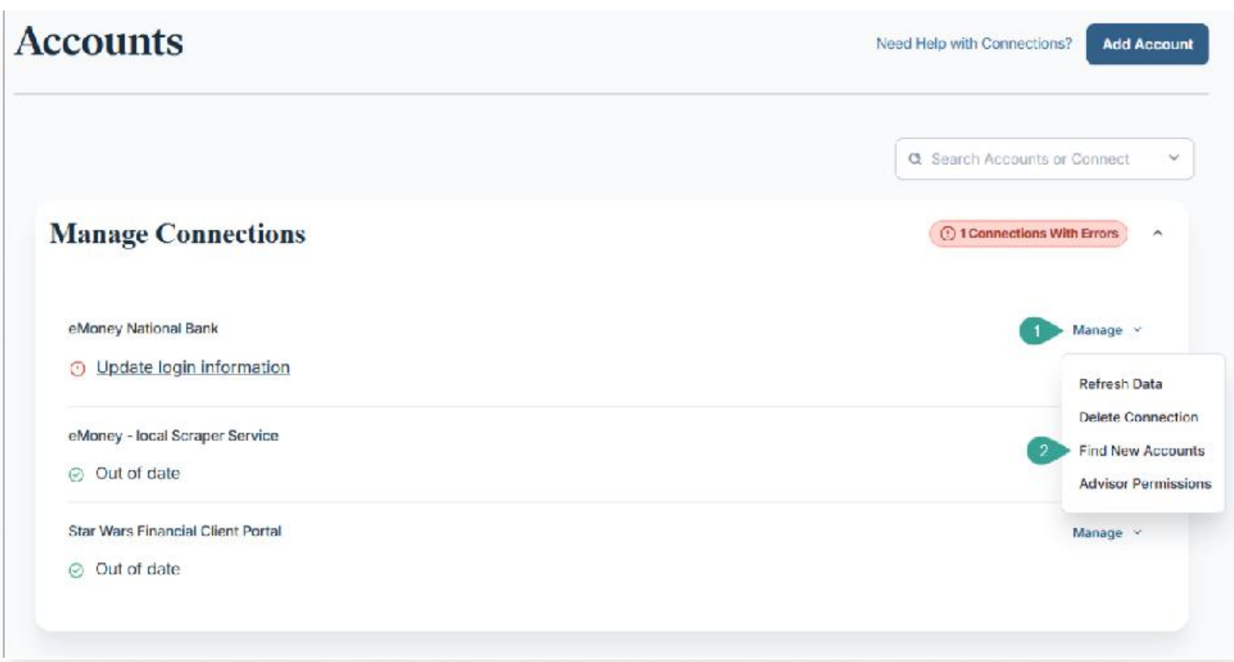
2. Click the Manage drop-down menu to take a handful of actions to manage your Connections:

    a. Select Refresh Data on the connection anytime to pull over updated account values manually.



    b. Select Find New Accounts to pull any new accounts opened after establishing the Connection.



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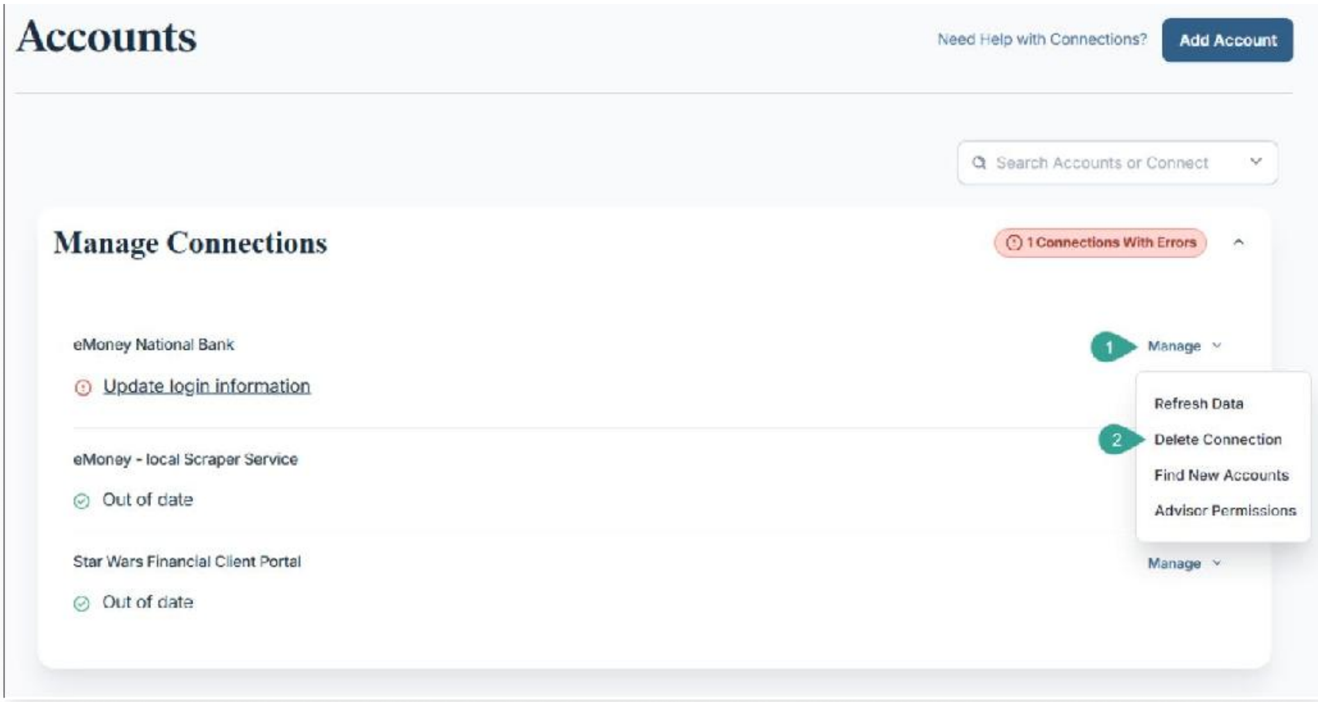
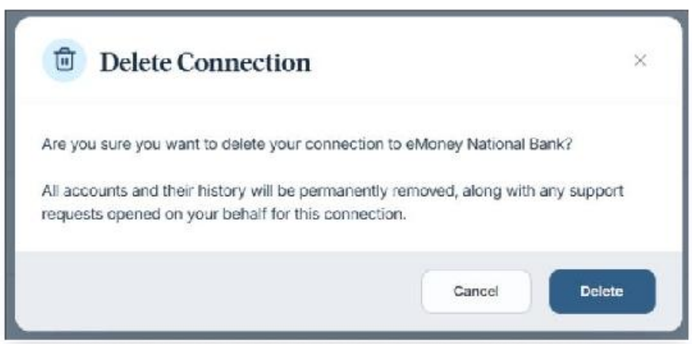
c. Select Delete Connection to remove the connection and all associated accounts.





ⓘ 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.

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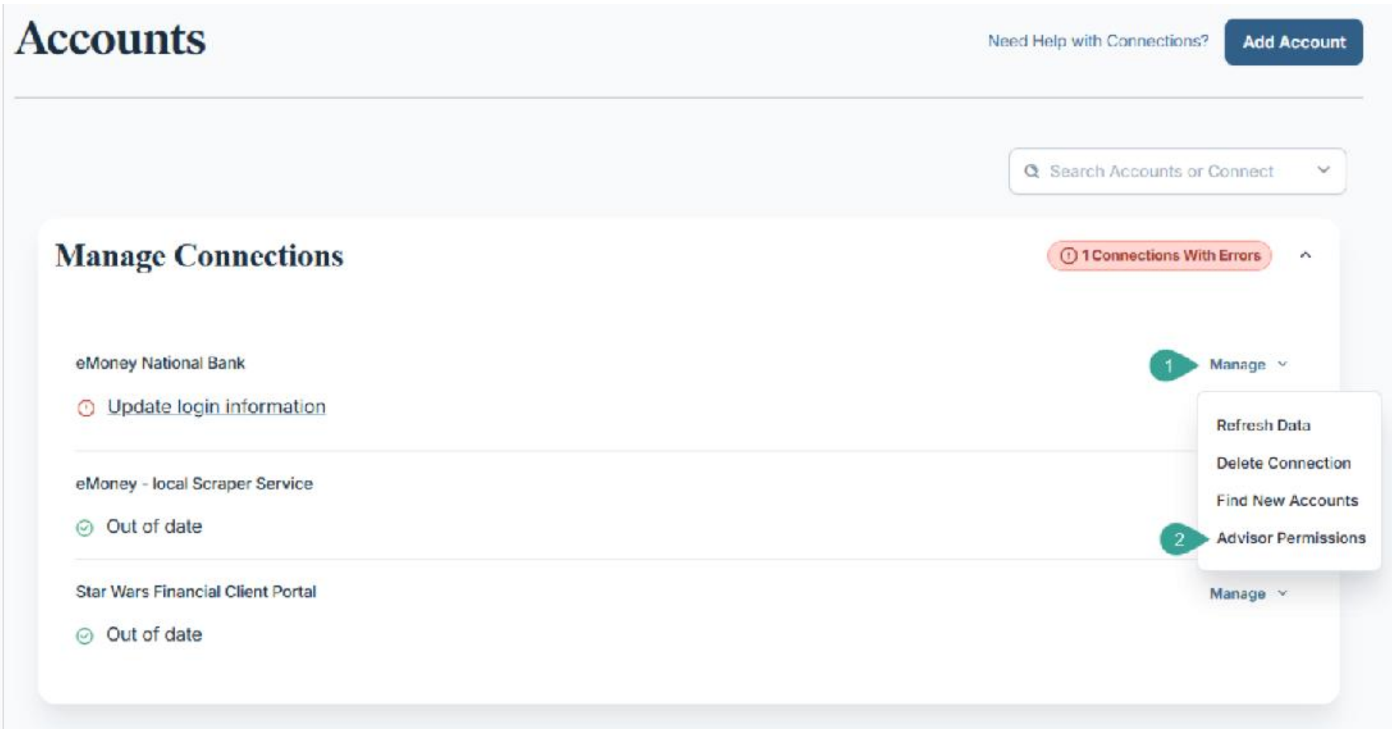
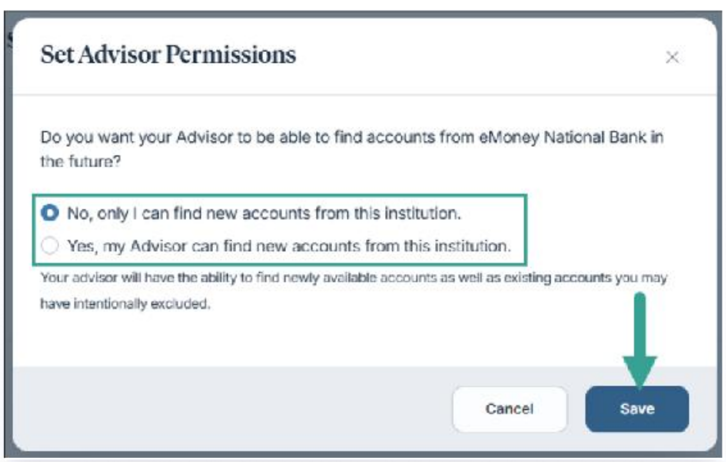
d. The Advisor Permissions selection displays a pop-up that allows you to enable your Advisor to Find New accounts on your behalf.





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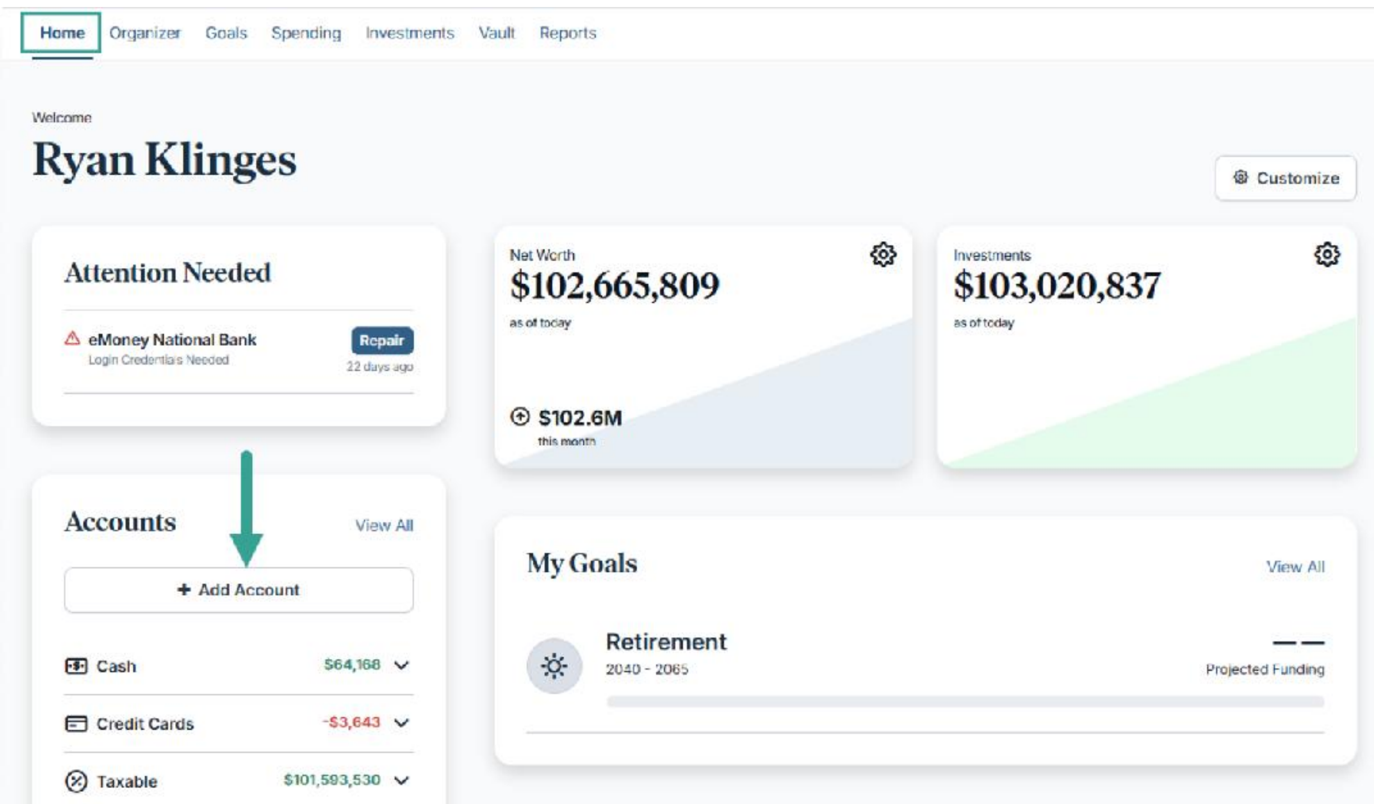
Adding Manual Accounts

ⓘ Note

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

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



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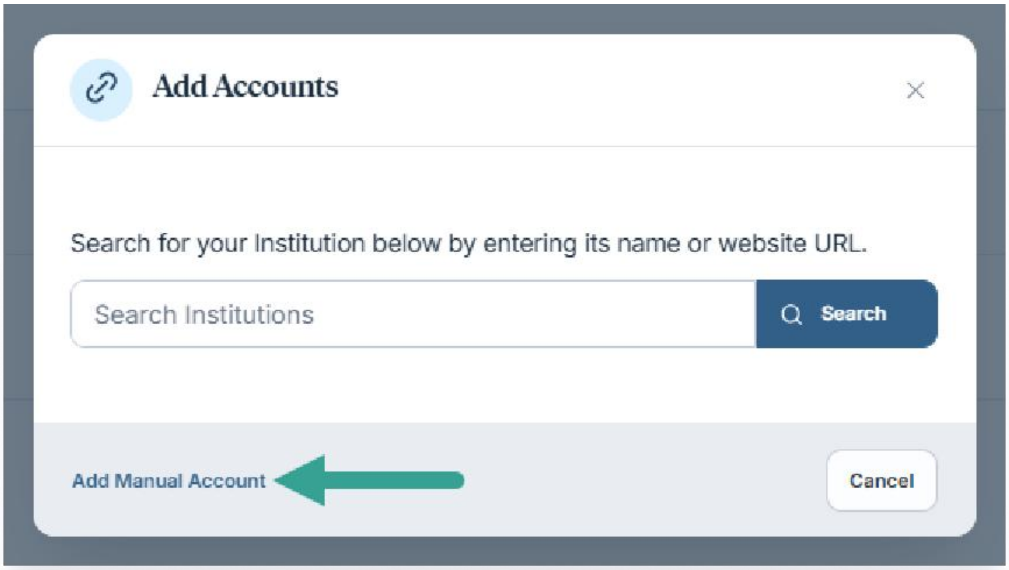
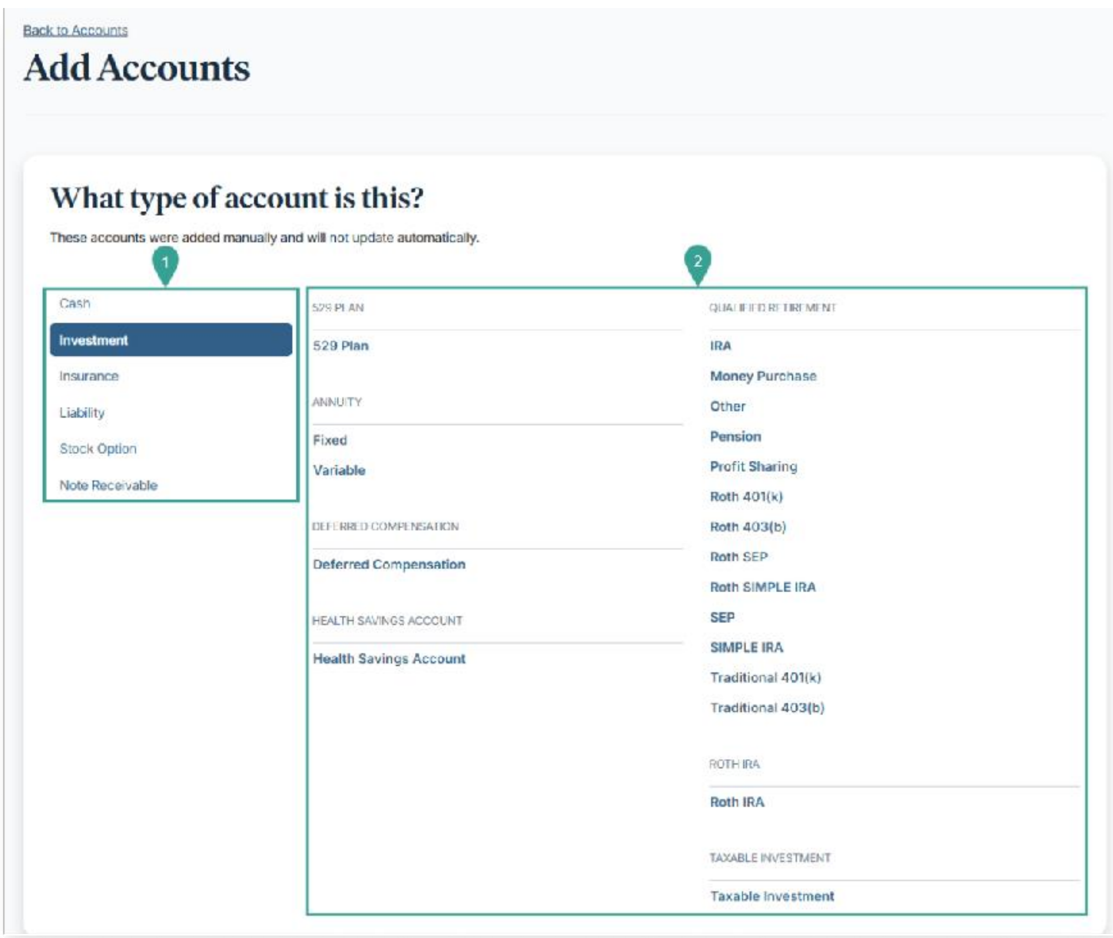
2. Click Add Manual Account.



3. Select the account category and specific type.



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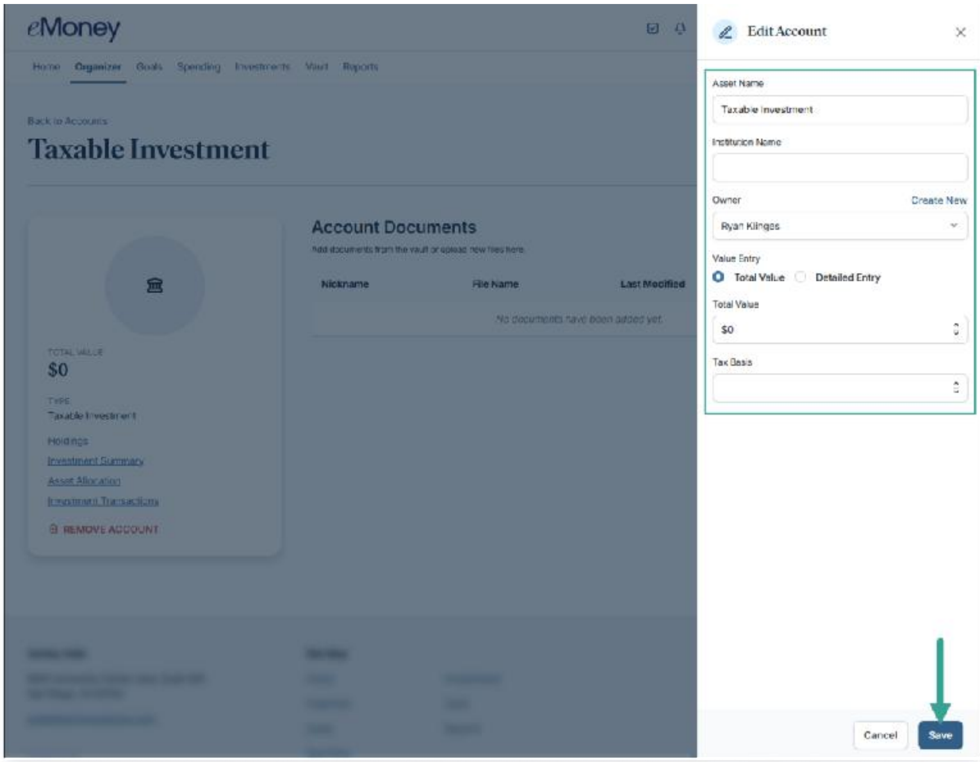
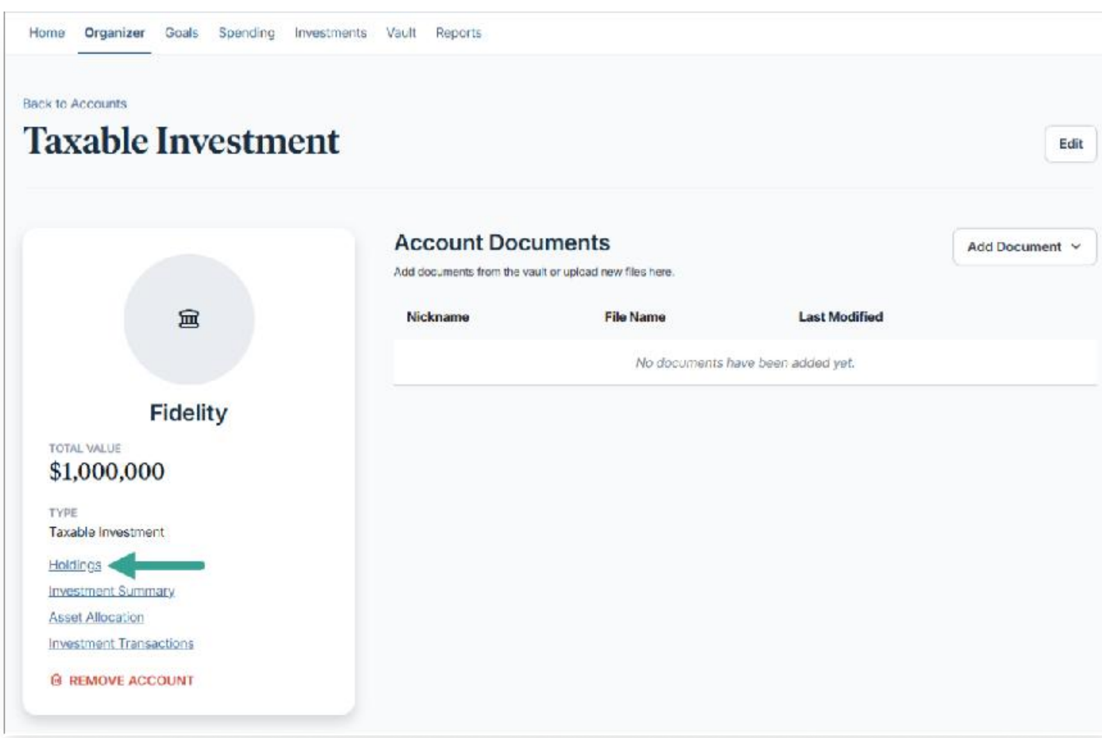
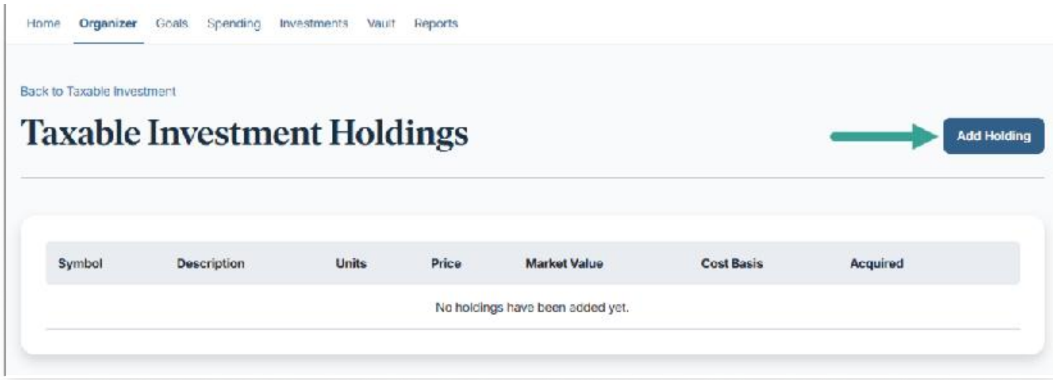
4. Enter the basic details about the account and click Save.



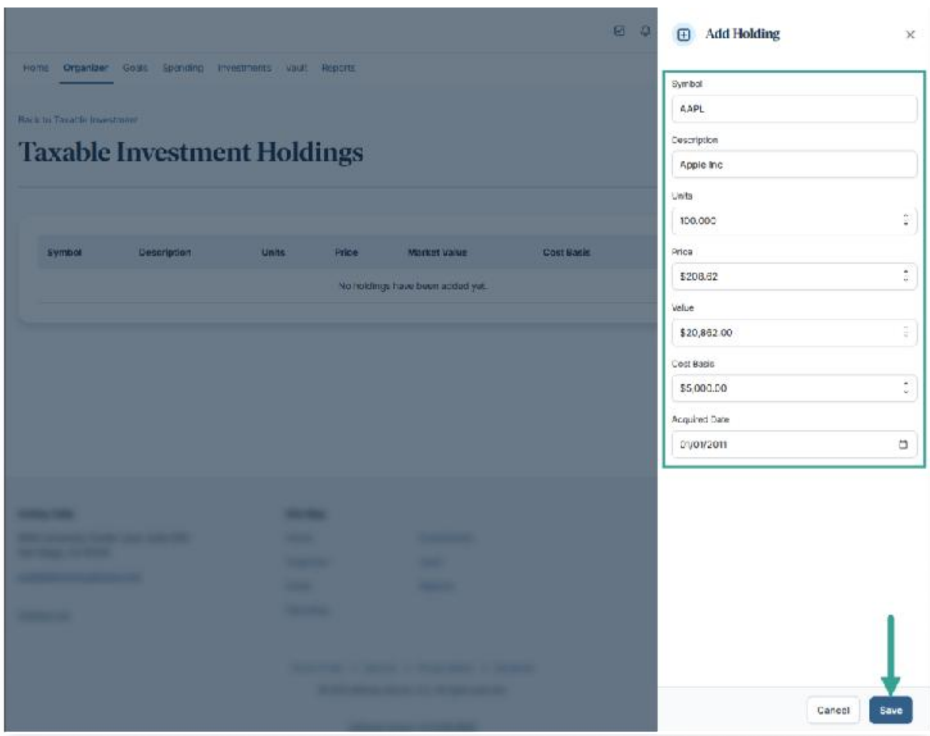
5. Click Holdings.



6. Click Add Holding.



7. For publicly traded holdings, enter the respective ticker or CUSIP Symbol. 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.