CLIENT AGGREGATION STEP-BY-STEP GUIDE

My Profile: Set Up Accounts

Overview

The account setup process will allow you to search for, and establish a connection with, the financial institutions with which you have online accounts.

1. On the My Accounts page, click the **Set Up Accounts** link.
2. Click the arrow next to the Find an Institution that box, and then select the type of search you want to perform (**Contains, Begins With, or Ends With**).
3. Enter the part of the name that corresponds with your choice, and then click **Select An Institution**.
4. A list of institutions that match your search criteria will be displayed.
5. Scroll through the list, and select the institution where your account resides.
6. Click **Enter Your Credentials**.
7. Enter your account credentials, and then select **Save Your Credentials**.
   The account credentials that are requested will differ depending on the institution.
8. By default, all of your accounts are selected for sharing with your advisor. To remove the ability for your advisor to view any of your accounts, click the arrow next to the Share box, and then click **Select Accounts**. Select the box next to the account (or accounts) that you don't want to share with your advisor to remove the check mark.
9. Click **Share Selected Accounts** to save your changes.
   A page will appear with information about the account or accounts you added. To view the **Account Summary** page, click the **Done. Back to My Accounts** link. The new account (or accounts) will now be listed on the My Accounts page.

Notes

- If you do not share accounts with your advisor, the accounts will not be included in your financial plan.
- The advisor will not have access to your account credentials.