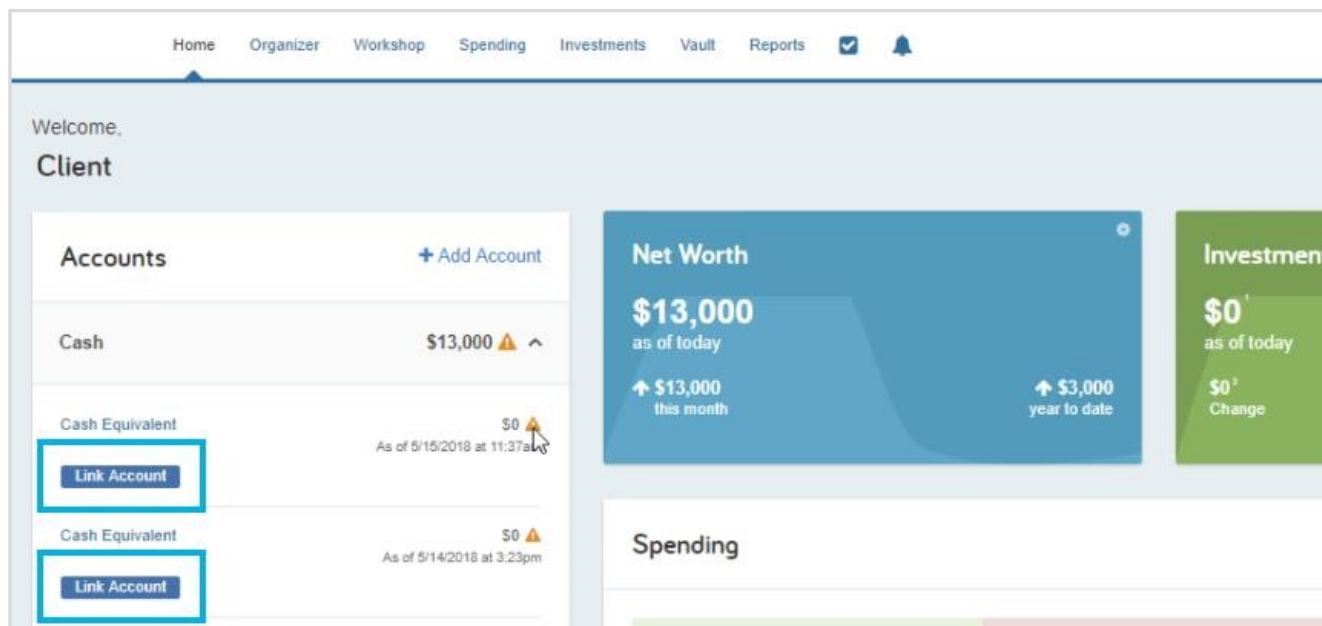


Link Manually Entered Accounts

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!



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**.

The screenshot shows the 'Connect Account' workflow screen. It has a progress bar with three steps: 1 Find Institution, 2 Select Your Account, and 3 Link Account. The first step is active. On the left, there is a section for 'Existing Account Data' with the following information: Account Name: Joint Savings, Balance (as of 03/08/18 at 4:08 PM): \$20,419, Type: Taxable Investment. On the right, there is a search box titled 'Enter Your Institution's Name or Website Address' with 'National Bank' entered. Below the search box, there is a message: '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'. Below the message, there is a 'Search Results (2 results found)' section with two links: 'National Bank' and '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

Account Name
Joint Savings
Balance (as of 03/08/18 at 4:08 PM)
\$20,419
Type
Taxable Investment

Enter Credentials

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 Account

1 Find Institution 2 Select Your Account 3 Link Account

Existing Account Data

Account Name
Joint Savings
Balance (as of 03/08/18 at 4:08 PM)
\$20,419
Type
Taxable Investment

Select Account

You've successfully connected to eMoney National Bank. Please select the account below that best matches your existing account to continue.

Account	Type	Balance
<input type="radio"/> Business Checking (****9837)	Taxable Investment	\$2,214 May 10, 2018 11:14 AM
<input type="radio"/> Joint Checking (****7591)	Taxable Investment	\$474 May 10, 2018 11:14 AM
<input type="radio"/> Joint Savings (****5416)	Taxable Investment	\$20,419 May 10, 2018 11:14 AM
<input type="radio"/> Personal Cher	Taxable Investment	\$1,766 May 10, 2018 11:14 AM
<input type="radio"/> Retirement Sa	Taxable Investment	\$10,745 May 10, 2018 11:14 AM

Have another online login to eMoney National Bank? Add another eMoney National Bank login now.

Previous Continue

Link Manually Entered Accounts

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.

Connect Account

Find Institution Select Your Account Link Account

Your account is now connected.
You have 2 accounts left requiring connection. Select one below to continue.

Account	Type	Institution	Balance
<input type="radio"/> Personal Checking	Taxable Investment	eMoney National Bank	\$1,766 03/08/18 at 4:08 PM
<input type="radio"/> Retirement Savings	Taxable Investment	eMoney National Bank	\$10,745 03/08/18 at 4:08 PM