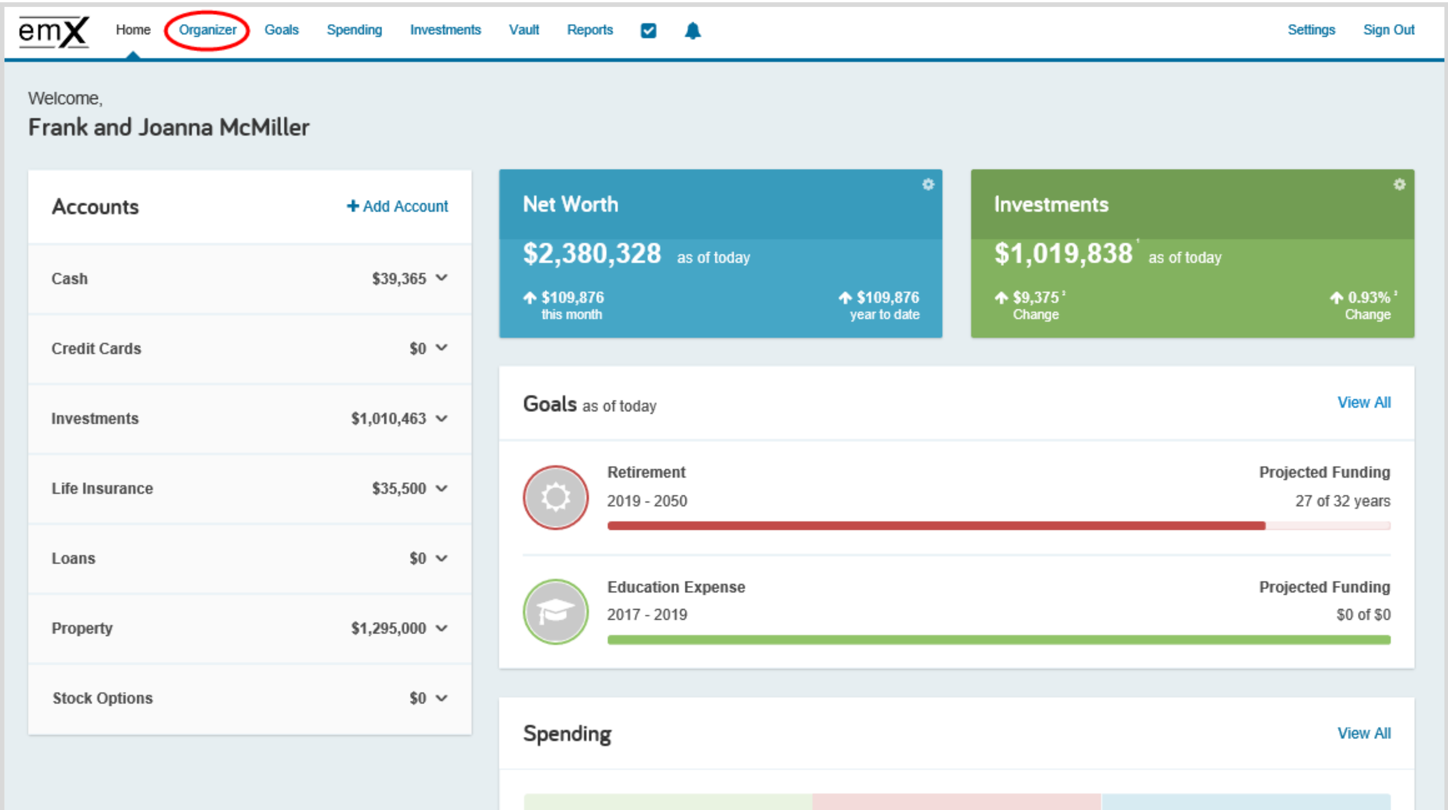
# Adding Accounts

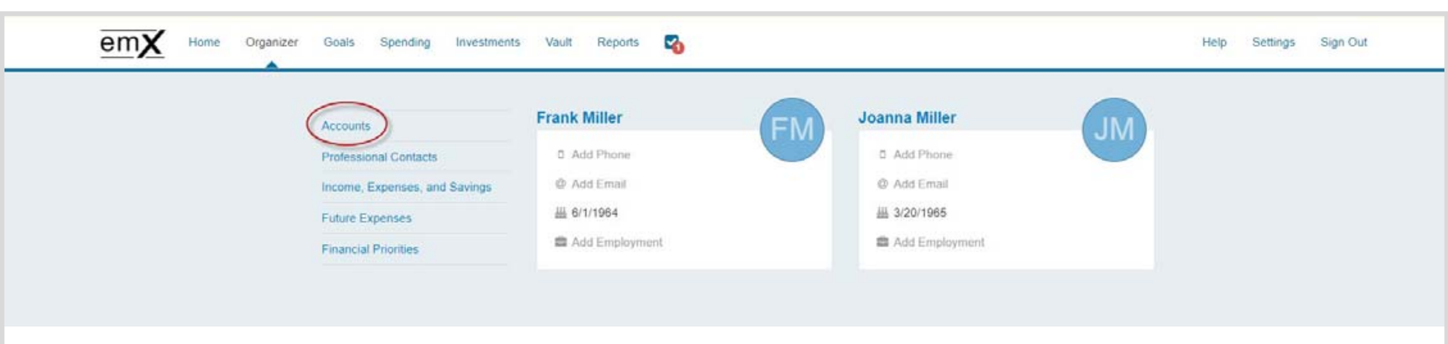
In this user guide, we will demonstrate how to establish a connection with your personal banking institutions. A connection is a direct link with an institution that feeds over updated account information.

1. From your home page, click **Organizer**.




You can also click the **+Add Account** link directly from the Home page!

2. Click **Accounts**.



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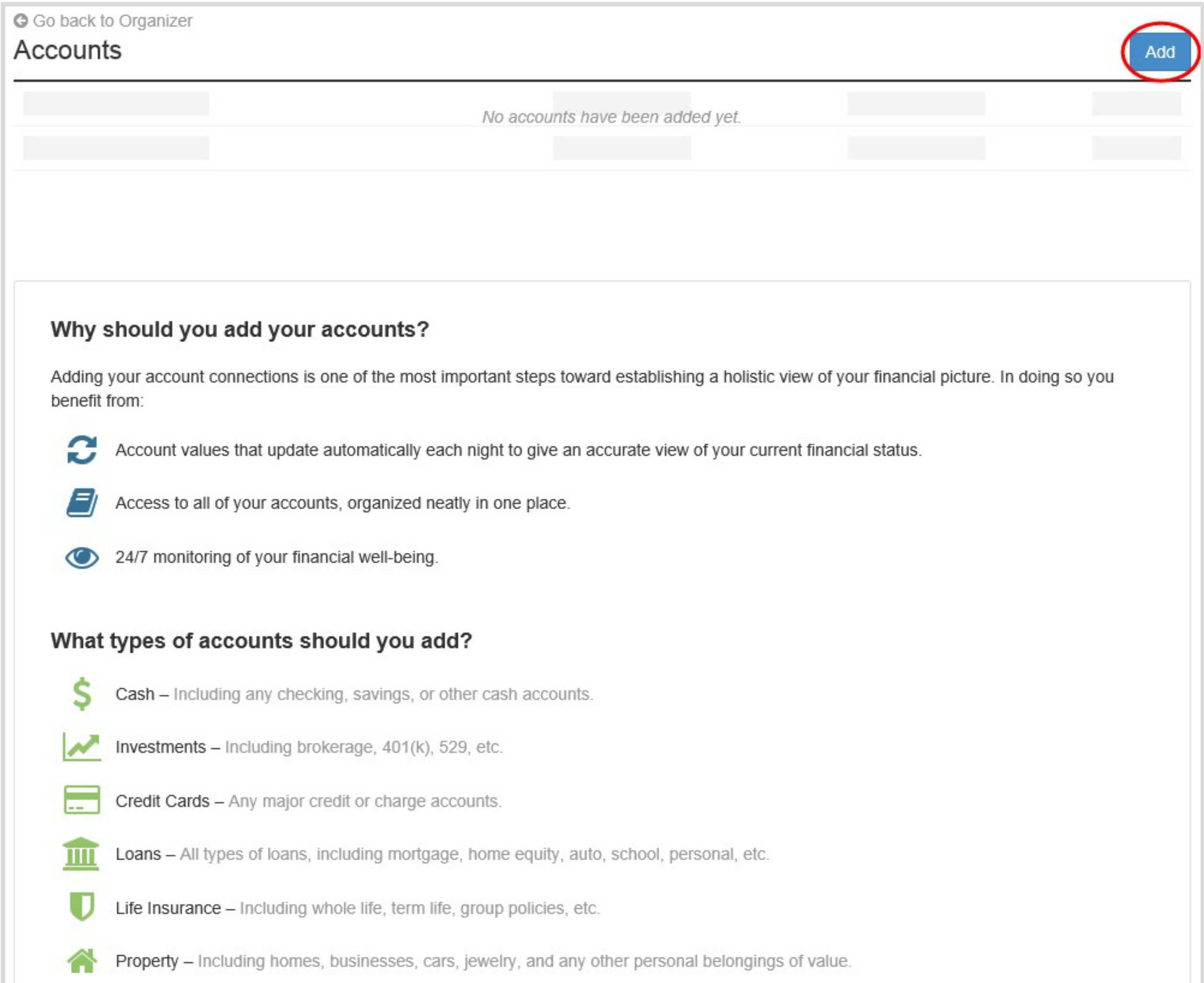
3. Review the information on why you should add accounts, and what type of accounts you should add. Click **Add**.



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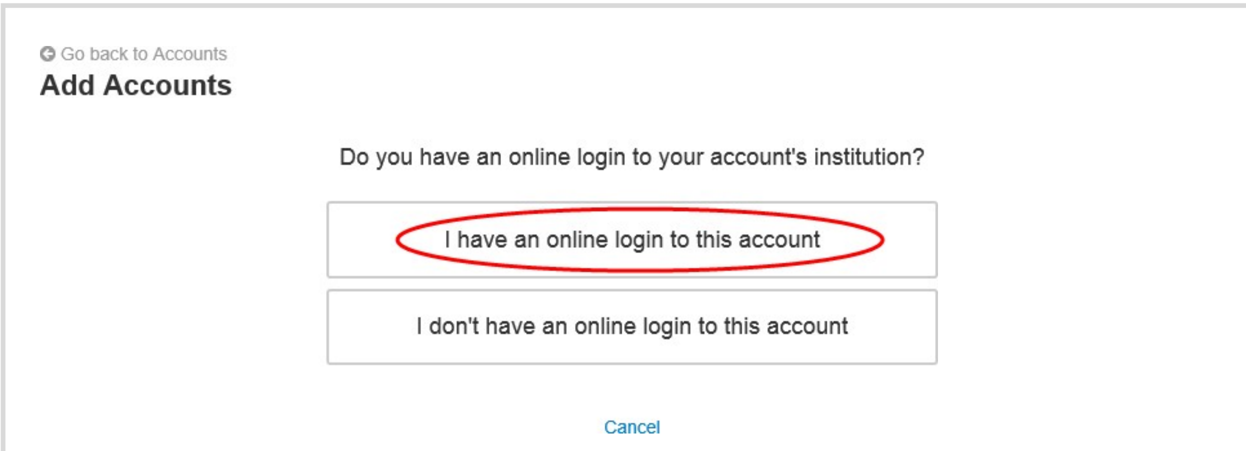
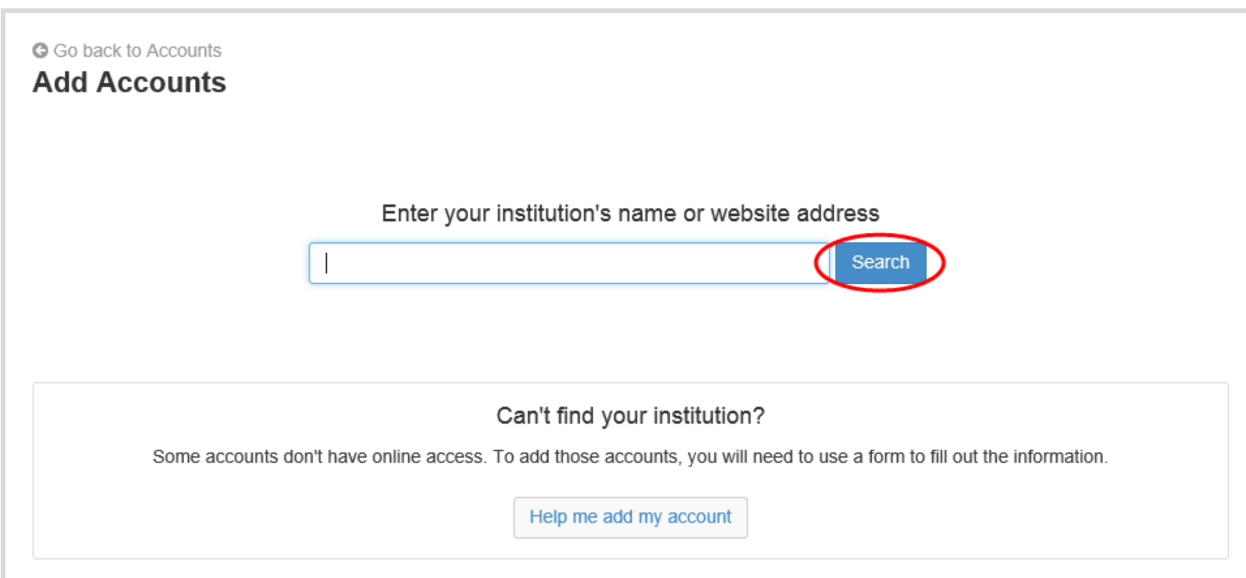
4. Select whether or not you have an online login for this account.

**Please Note:** If you do not have an online login for this account, the application will help you add the accounts manually.




5. Enter the institution's name or website address and click **Search**.



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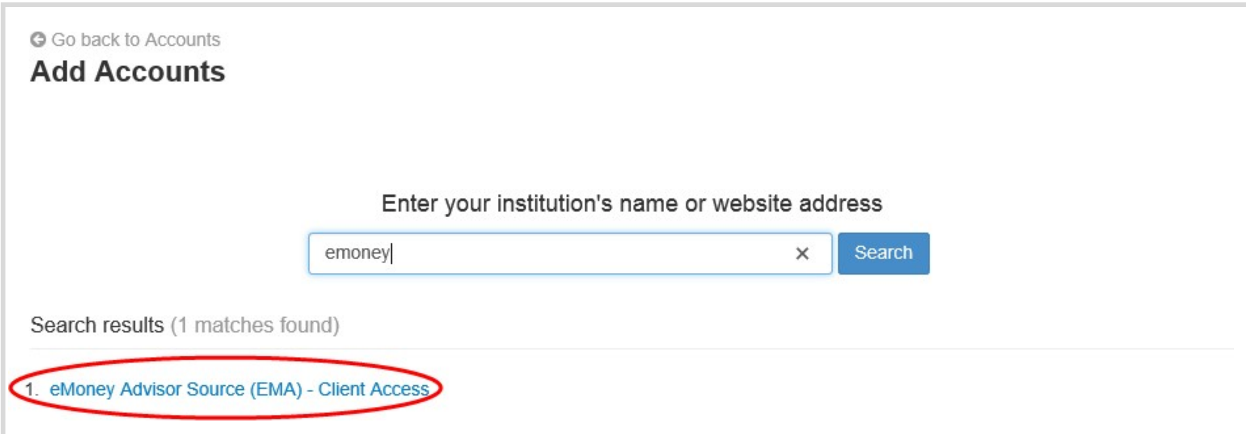
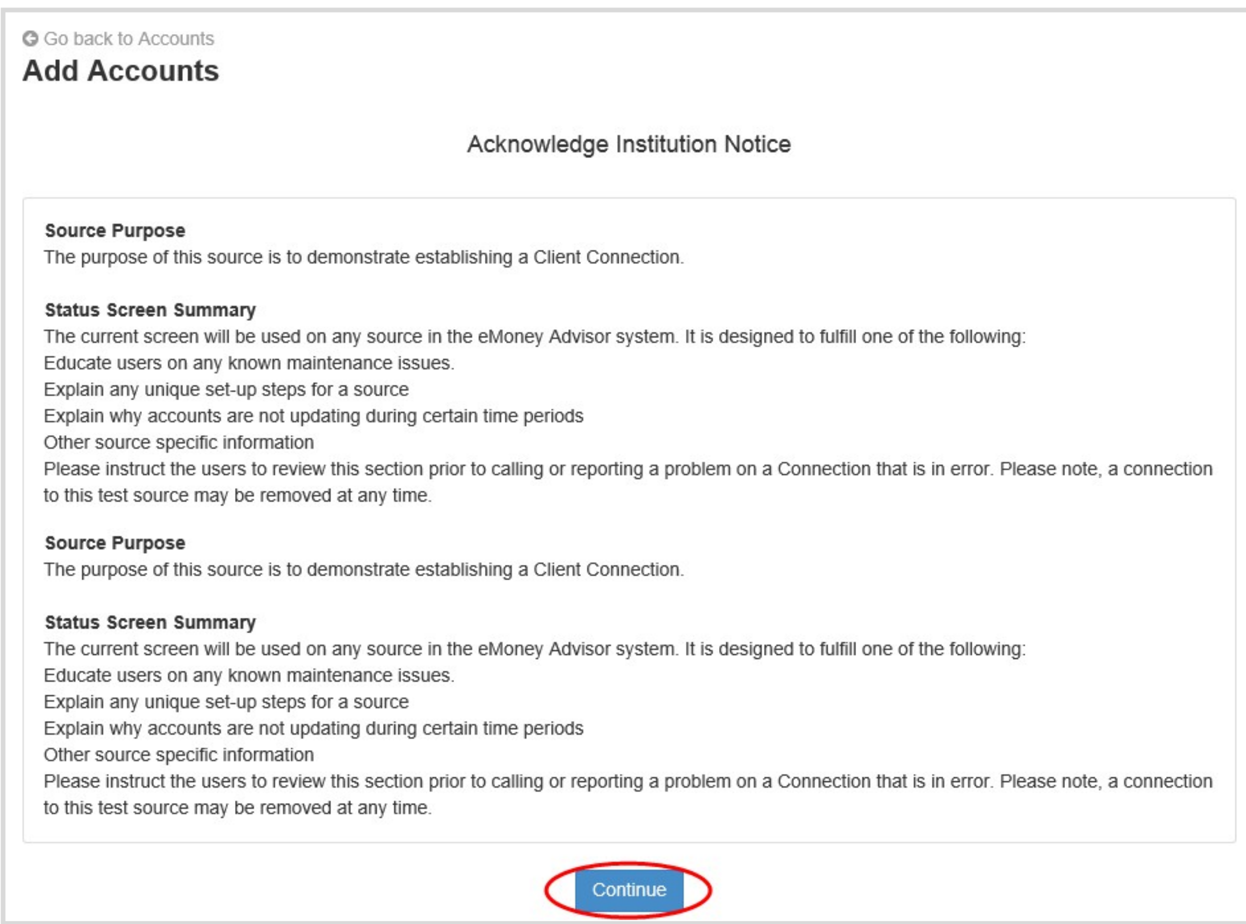
6. From the search results found, select the appropriate link.




7. 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**.



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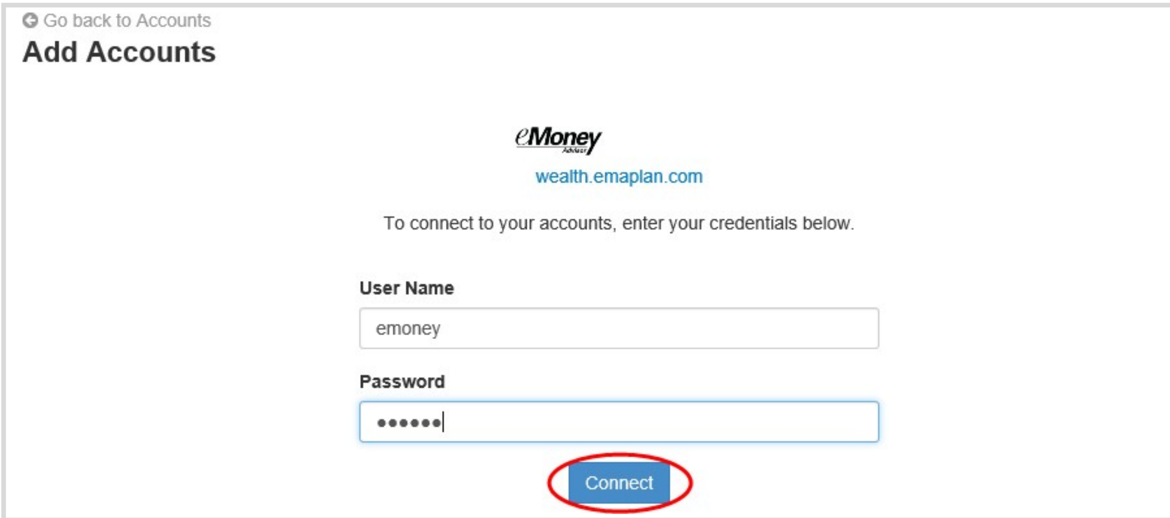
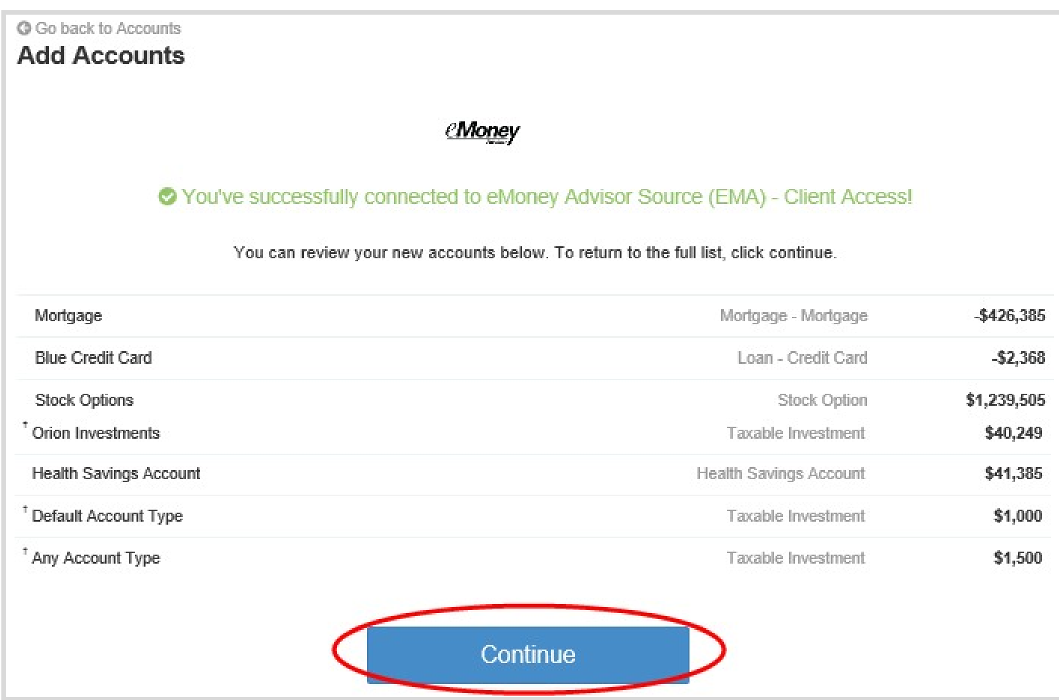
8. Enter in your login credentials for this institution and click **Connect**. If there's an issue connecting to your accounts, you'll receive a status message describing the problem. Click on the message to learn how to fix it.




9. 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.



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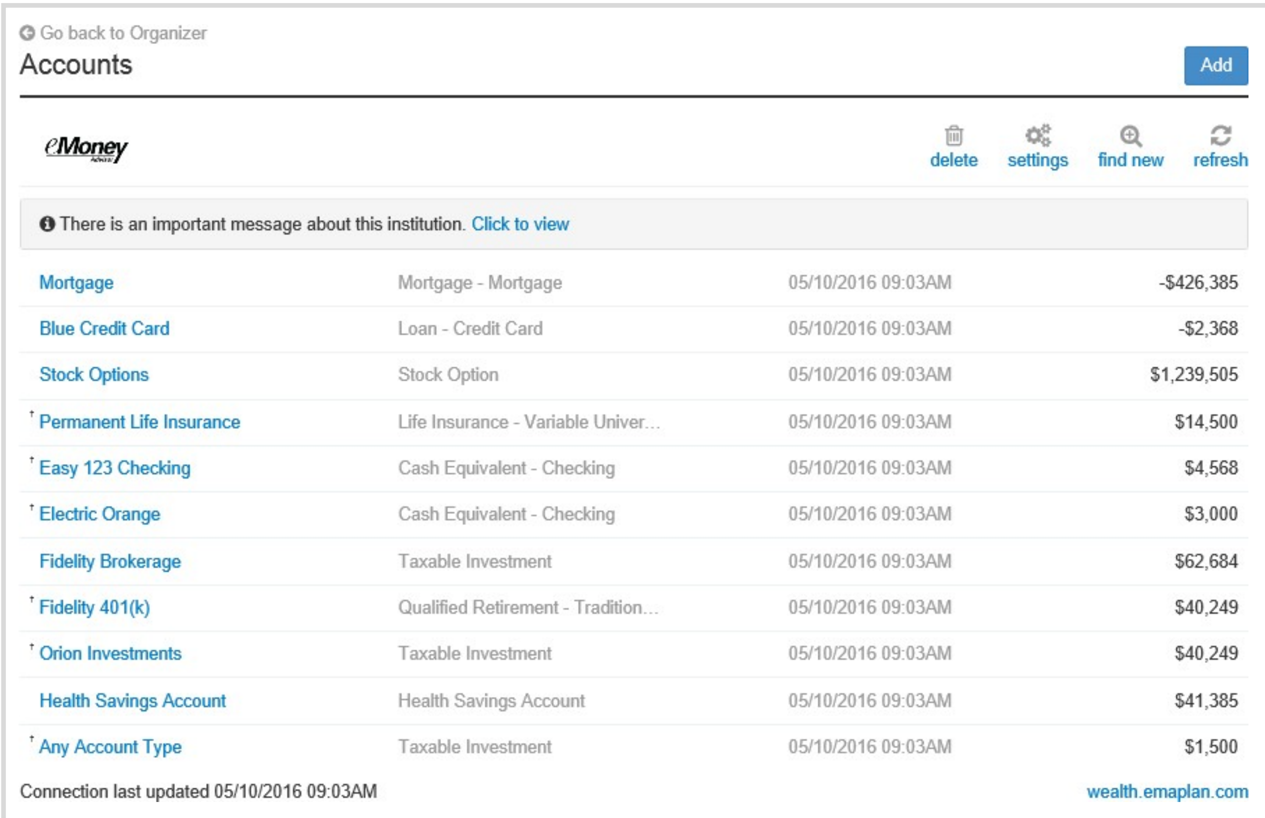
10. On the Accounts page you can easily see when your accounts with an institution last updated or if any accounts are in an errored state.




| | | | |
|---|---|---|---|
| Mortgage | Mortgage - Mortgage | 05/10/2016 09:03AM | -$426,385 |
| Blue Credit Card | Loan - Credit Card | 05/10/2016 09:03AM | -$2,368 |
| Stock Options | Stock Option | 05/10/2016 09:03AM | $1,239,505 |
| † Permanent Life Insurance | Life Insurance - Variable Univer... | 05/10/2016 09:03AM | $14,500 |
| † Easy 123 Checking | Cash Equivalent - Checking | 05/10/2016 09:03AM | $4,568 |
| † Electric Orange | Cash Equivalent - Checking | 05/10/2016 09:03AM | $3,000 |
| Fidelity Brokerage | Taxable Investment | 05/10/2016 09:03AM | $62,684 |
| † Fidelity 401(k) | Qualified Retirement - Tradition... | 05/10/2016 09:03AM | $40,249 |
| † Orion Investments | Taxable Investment | 05/10/2016 09:03AM | $40,249 |
| Health Savings Account | Health Savings Account | 05/10/2016 09:03AM | $41,385 |
| † Any Account Type | Taxable Investment | 05/10/2016 09:03AM | $1,500 |

Connection last updated 05/10/2016 09:03AM    wealth.emaplan.com

11. 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.

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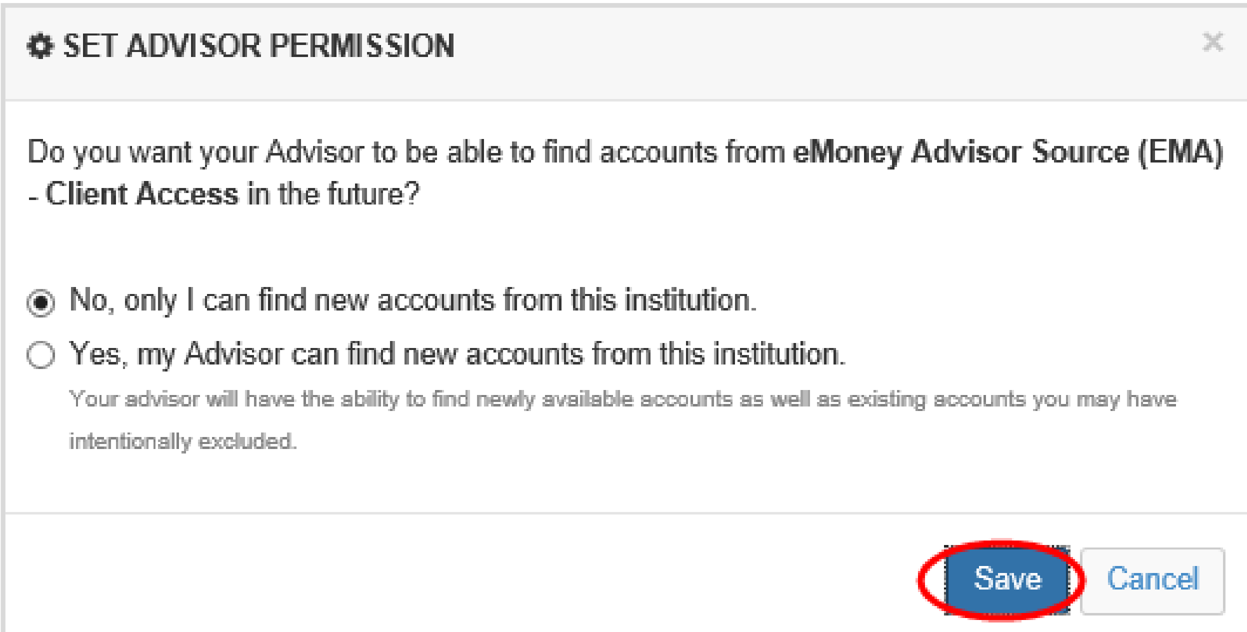
12. The settings link gives you the option to enable your Advisor to find new accounts on your behalf.



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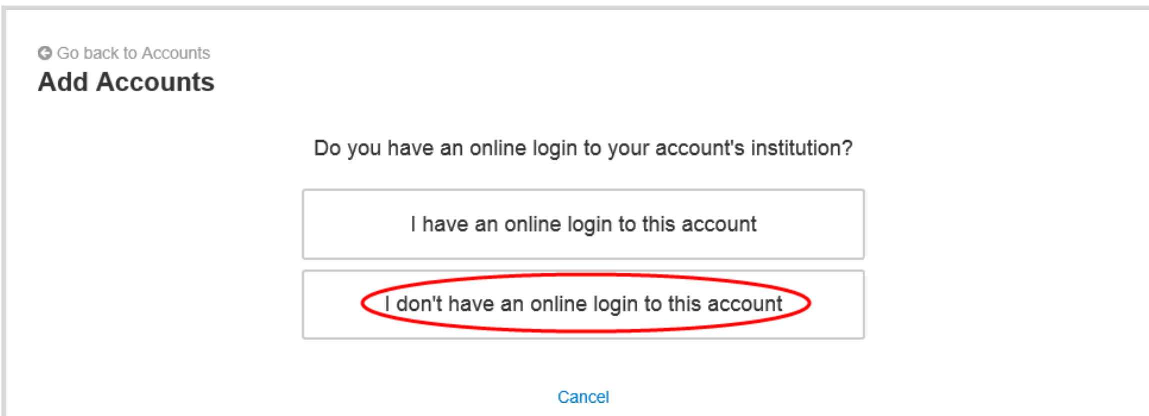
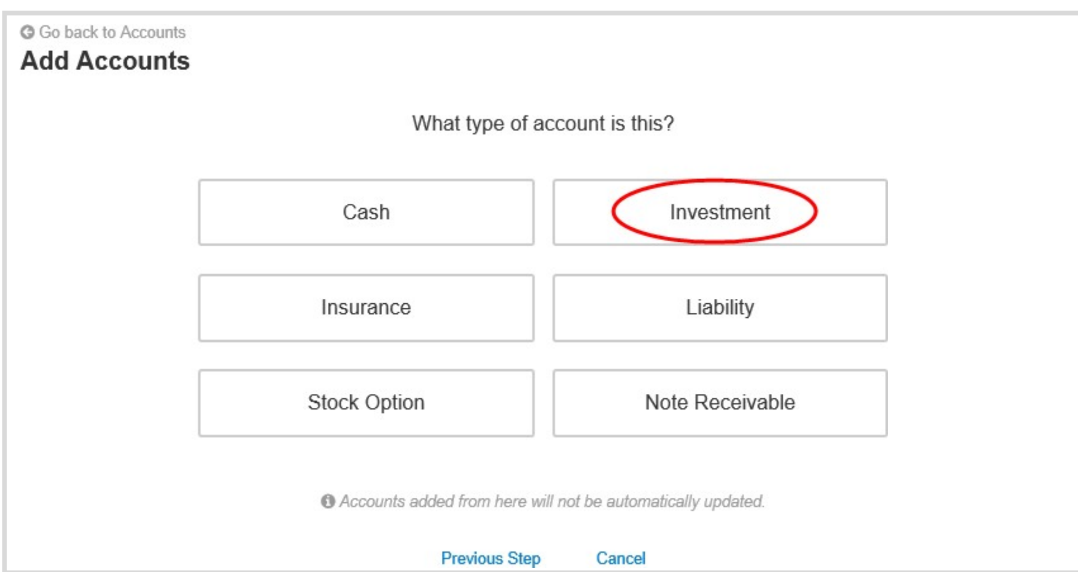
If you do **not** have an online login to an institution, follow the below steps to enter accounts in manually. While manual accounts do NOT update, they help build a better financial snap shot for both you and your advisor.

1. Click **Add** on the Accounts page.


2. Select “I don’t have an online login to this account.”




3. Select the type of account.



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4. Enter details about the account and click **Save**!