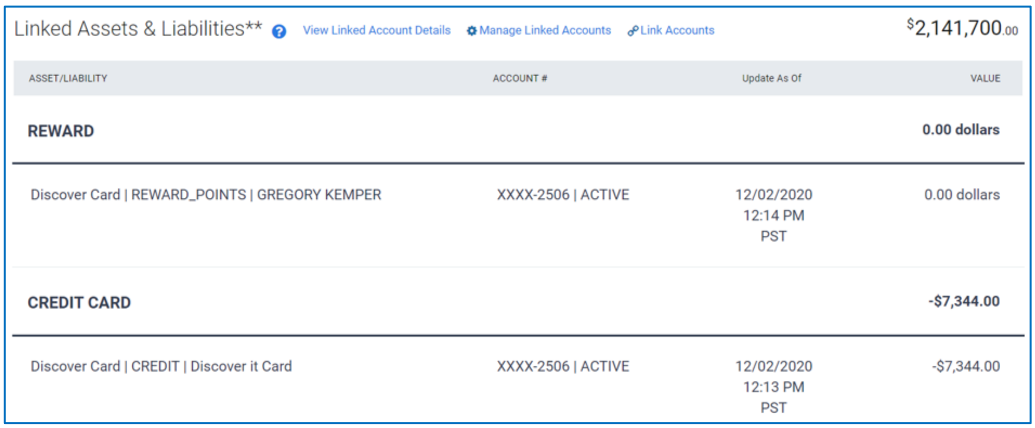
CLIENT PORTAL: Linked Accounts

Description

Linked Assets & Liabilities allows you to link those accounts that are held with providers other than Cetera affiliates, giving you a complete view of your financial picture.

To link an account, choose your account provider and enter your credentials, such as a user name and password used to access your information on that account provider's website.

Suggested accounts to link include outside investment accounts, bank accounts, credit cards, loans and mortgages.



Linked Assets & Liabilities** View Linked Account Details Manage Linked Accounts Link Accounts $2,141,700.00

ASSET/LIABILITY	ACCOUNT #	Update As Of	VALUE
REWARD			**0.00 dollars**
Discover Card | REWARD_POINTS | GREGORY KEMPER	XXXX-2506 | ACTIVE	12/02/2020 12:14 PM PST	0.00 dollars
CREDIT CARD			**-$7,344.00**
Discover Card | CREDIT | Discover it Card	XXXX-2506 | ACTIVE	12/02/2020 12:13 PM PST	-$7,344.00

Important to Know

The Linked Assets & Liabilities features is **not** available in the basic version of the Client Portal. If you would like to enable this feature, please contact your financial professional.

Confirm you are selecting the correct URL for your financial institution.

Confirm you have the correct username and password for your financial institution login.

You may be asked to complete secondary security requirements, like answering all your unique security questions, verifying a token or one-time password via mobile device or identifying images.

Ensure all your account information at your financial institution is up to date, like email address, phone number, and acceptance of terms and conditions.

If you experience any issues with linking accounts, check the Account Status window for additional information.

You will be able to view account holdings and transactions for your linked accounts.

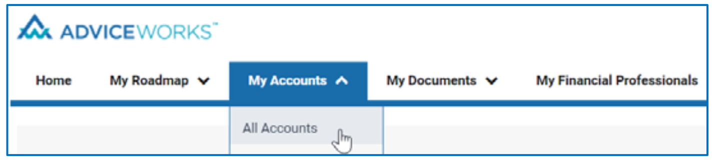
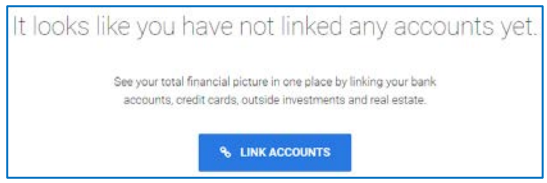
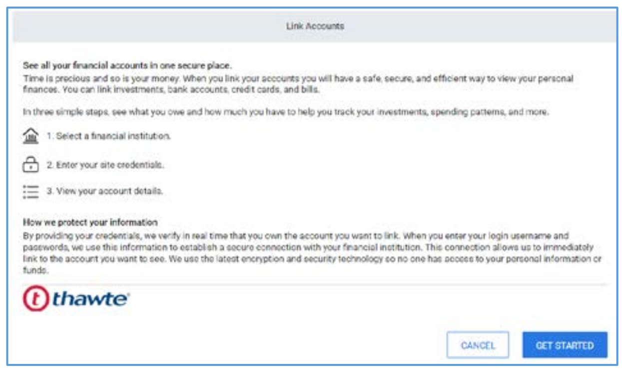
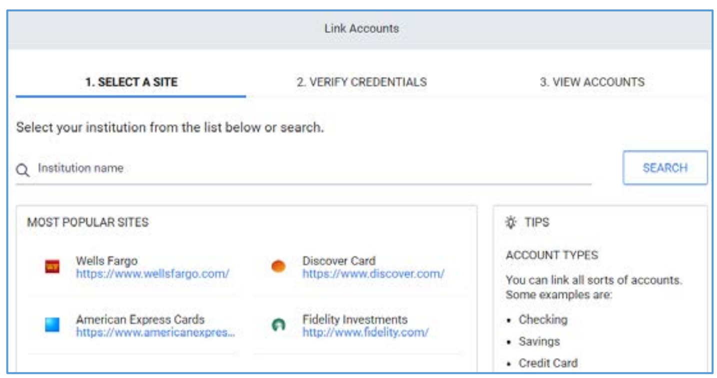
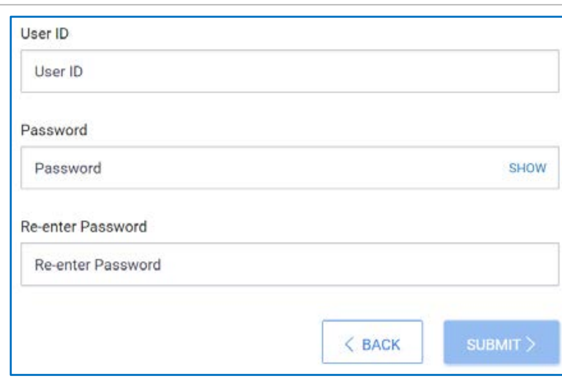
You can delete a linked account through the Managed Linked Accounts link.

The account value, holdings and transactions will be updated nightly or when you login to the Client Portal.

When you link bank accounts and credit cards, you will have access to spending and budgeting tools.

When you link an account, your financial professional will receive a notification that you linked an account.

✓ How to Link Accounts

<table>
<tr><td>From the Client Portal Home Page, click My Accounts.
Click All Accounts.</td><td>
</td></tr>
<tr><td>Scroll down to Linked Assets & Liabilities.
Click Link Accounts to link additional accounts.</td><td>
</td></tr>
<tr><td>If this is your first attempt to link accounts, click the Link Accounts button.</td><td>
</td></tr>
<tr><td>Click Get Started.</td><td>
</td></tr>
<tr><td>Enter the Institution name and click Search.
Or select an institution name from the Most Popular Sites.</td><td>
</td></tr>
<tr><td>Enter your online account credentials:
User ID
Password
Re-enter Password
Click Submit.</td><td>
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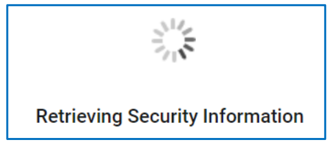
AdviceWorks will **Retrieve Security Information**.	
You will receive a **confirmation** of successfully linked account. Click **All Done**.