



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	A Manage Linked Accounts	d [₽] 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.



ADVICEWORKS JOB AID **Linked Accounts**



 How to Link Accounts 			
From the Client Portal Home Page , click My Accounts . Click All Accounts .	Home My Roadmap V My Accounts N My Documents V My Financial Professionals		
Scroll down to Linked Assets & Liabilities . Click Link Accounts to link additional accounts.	Linked Assets & Liabilities** 🕢 View Linked Account Details • Manage Linked Accounts • Link Accounts		
If this is your first attempt to link accounts, click the Link Accounts button.	It looks like you have not linked any accounts yet. See your total financial picture in one place by linking your bank accounts, ordit cards, outside investments and real estate.		
Click Get Started.	Link Accounts See all your francial accounts in one secure place. The is proclose and so is your money. When you link your accounts you will have a safe, secure, and efficient way to view your personal frances. You can link investments, bank accounts, credit carfs, and bills. In these simple staps, see what you one and how much you have to help you track your investments, spending parterns, and more. In these simple staps, tee what you one and how much you have to help you track your investments, spending parterns, and more. In these simple staps, your account details. In the your account details. In the second rotation information By providing your condentials, we would have the help you can the account you want to link. When you enter your login usemam and how should have to be account you want to link. When you enter your login usemam and the should have to be account you want to link. When you enter your preval information or true. In the decount your want to see. We use the latest encryption and security technology to no one has access to your personal information or true. In the decount you want to see. We use the latest encryption and security technology to no one has access to your personal information or true. Intervention Intervention Intervention Intervention Intervention Intervention Intervention Intervention Intervention Intervention Intervention <td< td=""></td<>		
Enter the Institution name and click Search . Or select an institution name from the Most Popular Sites.	Link Accounts 1. SELECT A SITE 2. VERIFY CREDENTIALS 3. VIEW ACCOUNTS Select your institution from the list below or search.		
Enter your online account credentials: User ID Password Re-enter Password Click Submit.	http://www.americanexpres http://www.fidelity.com/ Savings Credit Card User ID User ID Password Password Password Re-enter Password Re-enter Password Ke-enter Password SHOW Re-enter Password SHOW SHOW SHOW SHOW SHOW SHOW SHOW SHOW		

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ADVICEWORKS JOB AID



Linked Accounts

AdviceWorks will Retrieve Security Information.	
	Retrieving Security Information
You will receive a confirmation of successfully linked account.	Congratulations! You have successfully linked your account
Click All Done.	Discover Card
	Cards Discover it Card Credit x-2506
	ALL DONE LINK ANOTHER ACCOUNT

Individuals affiliated with Cetera firms are either Registered Representatives who offer only brokerage services and receive transaction-based compensation (commissions), Investment Adviser Representatives who offer only investment advisory services and receive fees based on assets, or both Registered Representatives and Investment Adviser Representatives, who can offer both types of services.

"Cetera Financial Group" refers to the network of independent retail firms encompassing, among others, Cetera Advisors, Cetera Advisor Networks, Cetera Investment Services (marketed as Cetera Financial Institutions or Cetera Investors), Cetera Financial Specialists, and First Allied Securities. All firms are members FINRA/SIPC.