

# See the Big Picture

### Connect Your Accounts to See Your Financial Snapshot

See a complete picture of your financial well-being updated automatically, every day. Get started by adding your financial accounts, like your checking account or retirement account, to your Personal Financial Website.

#### TO ADD A CONNECTION, FOLLOW THE STEPS BELOW:

- Log into your Personal Financial Website
- Click **Add Account**
- Select **I have an online login to this account**
- Type the name of the institution into the search bar
- Choose the connection from the list
- Enter your username and password

Once you've connected your accounts,  
see your financial scenario come to life!

#### KEEP THESE TIPS IN MIND WHEN ADDING AND MANAGING YOUR CONNECTIONS:

1. Test your credentials. Before entering your username and password in your Personal Financial Website, log into your financial institution to ensure your credentials are up-to-date.
2. Be proactive. If you make any changes to your account, like setting a new password, be sure to update your credentials in your Personal Financial Website too.

#### *Having trouble with a connection?*

Connections may break occasionally. If you run into a Connections error, try these steps or contact your advisor for help.

**Click on Find New to begin.** This starts a new session at your financial institution, ensuring you are troubleshooting the most recent error that may be affecting your connection.

**Re-enter log-in credentials.** Some financial institutions set passwords to expire after a certain length of time. If this happens, you'll need to update your password at your financial institution and then update the connection on your Personal Financial Website.

**One-time access code.** Some financial institutions require a secure access code before connecting to your Personal Financial Website, which will be sent from your bank via email, text, or phone call. If you see this error, be sure to log in at the institution's website directly before requesting the access code be sent.

**Do not delete the account.** Deleting the connection will remove any accounts, transaction history, and tickets that are currently open. This can affect your spending and budgets and delay our ability to resolve the issue.