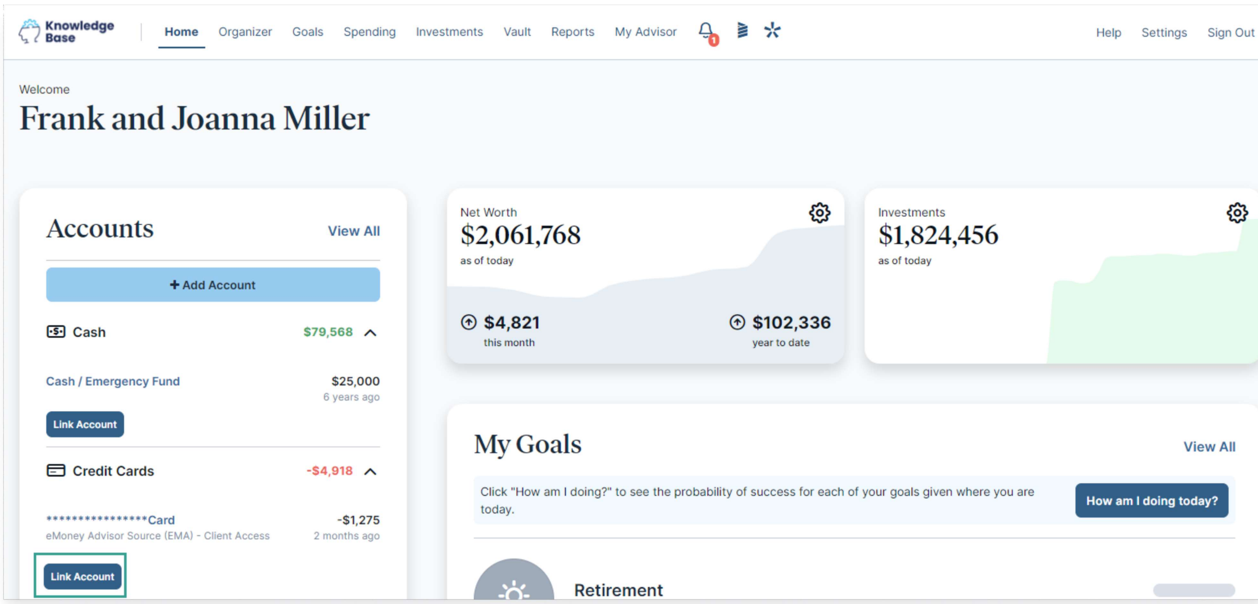
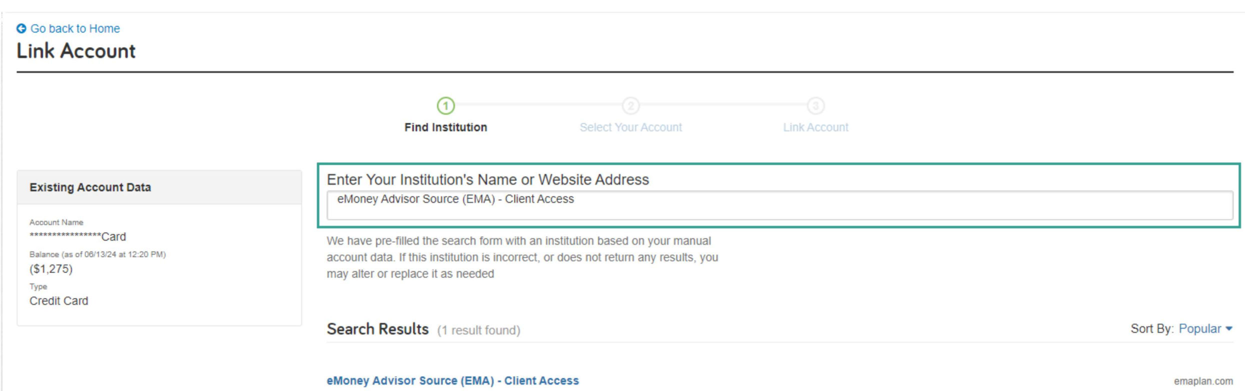
Link Manually Entered Accounts

This guide demonstrates how to connect your manually entered facts. 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. On your Home page, locate the Accounts tile on the left. Click on any section to expand. Any manually entered facts will have a **Link Account** button.



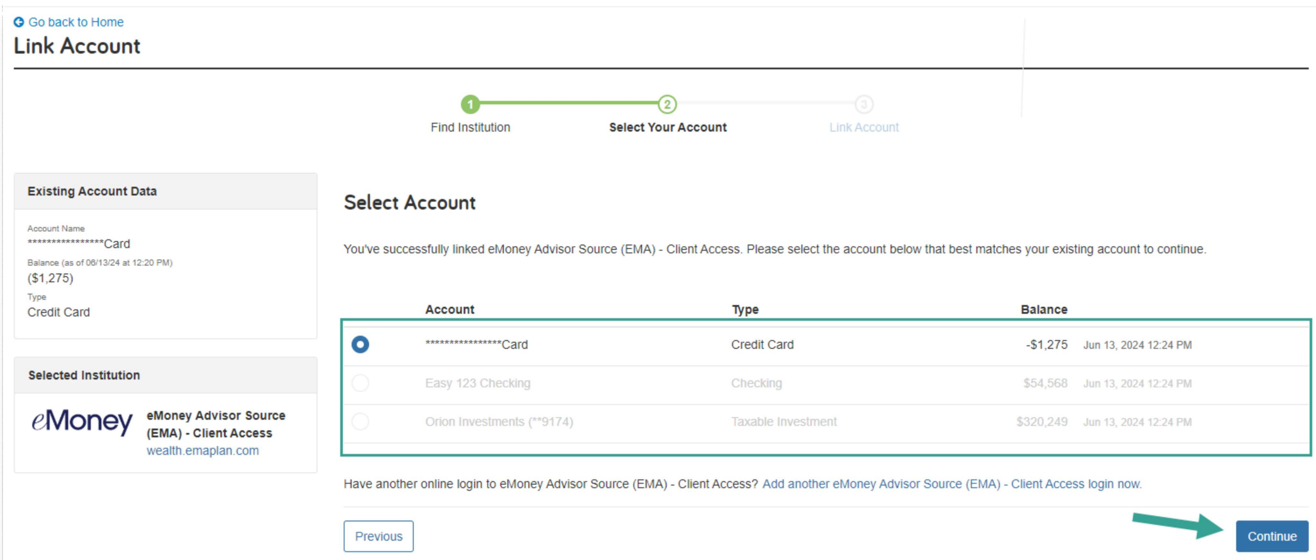
2. After clicking Link Account, you will be prompted to search for and identify the appropriate financial institution related to that specific account. Search for **Name** or **Website Address**.



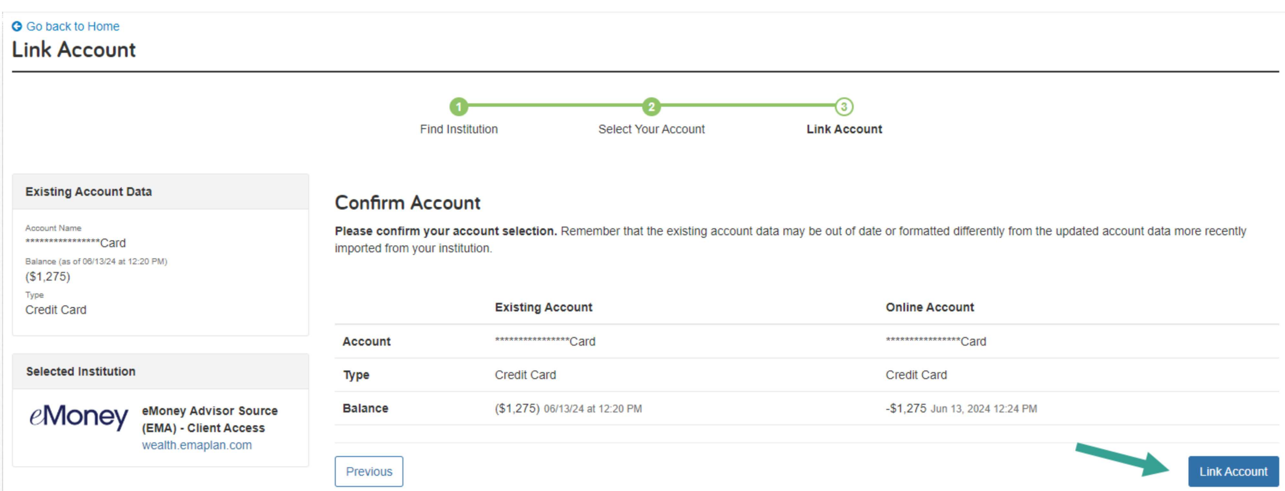
If you previously entered an Institution Name within your Organizer for an account, the application will pre-populate search results based on what you entered.

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.

4. Once the link is established, you will see a list of accounts that you can link to your site. Click the account that matches and then click **Continue**.



5. You will then be asked to Confirm your account selection by clicking Link Account.



Link Manually Entered Accounts

6. You'll receive a confirmation when the account is linked.