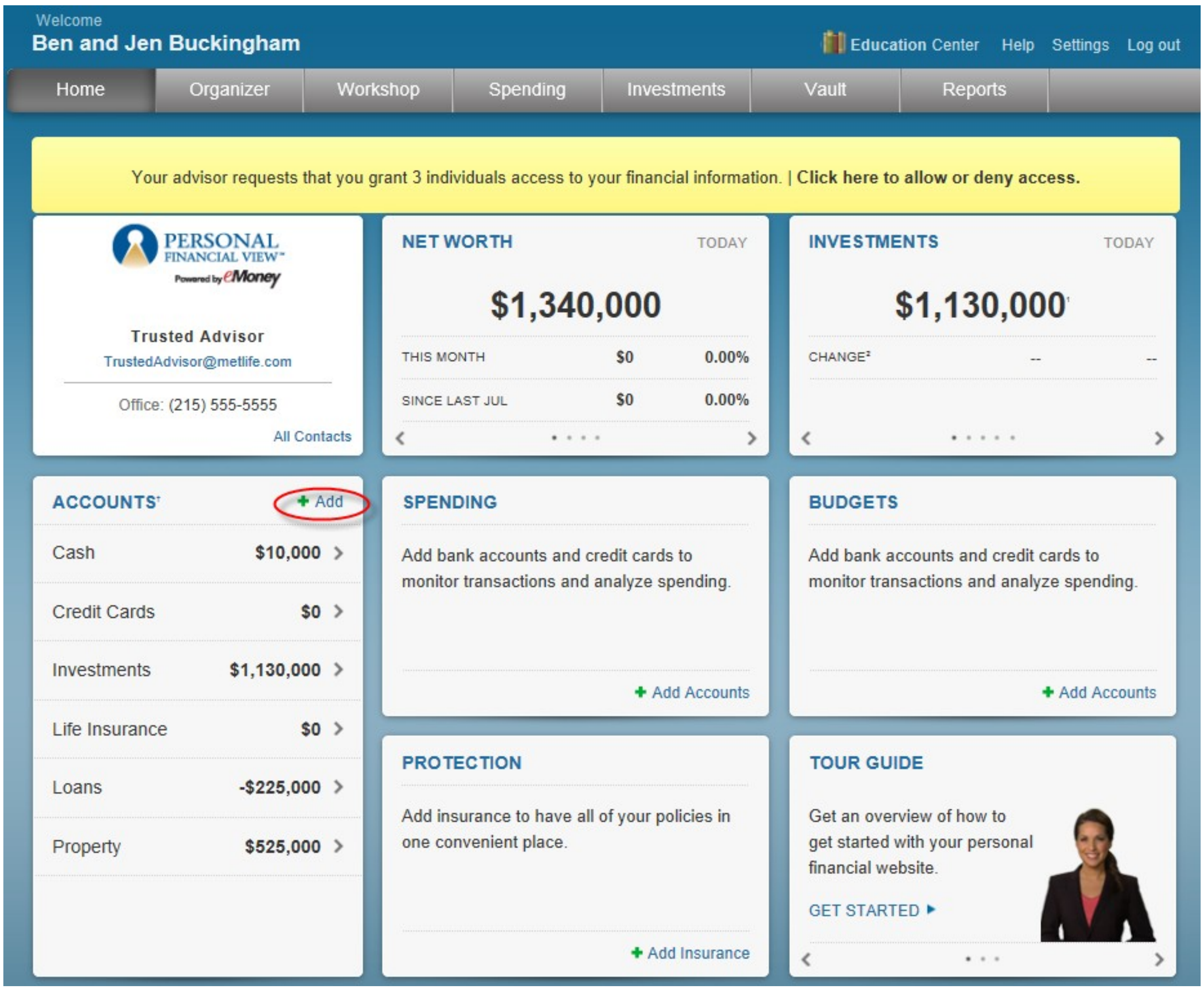
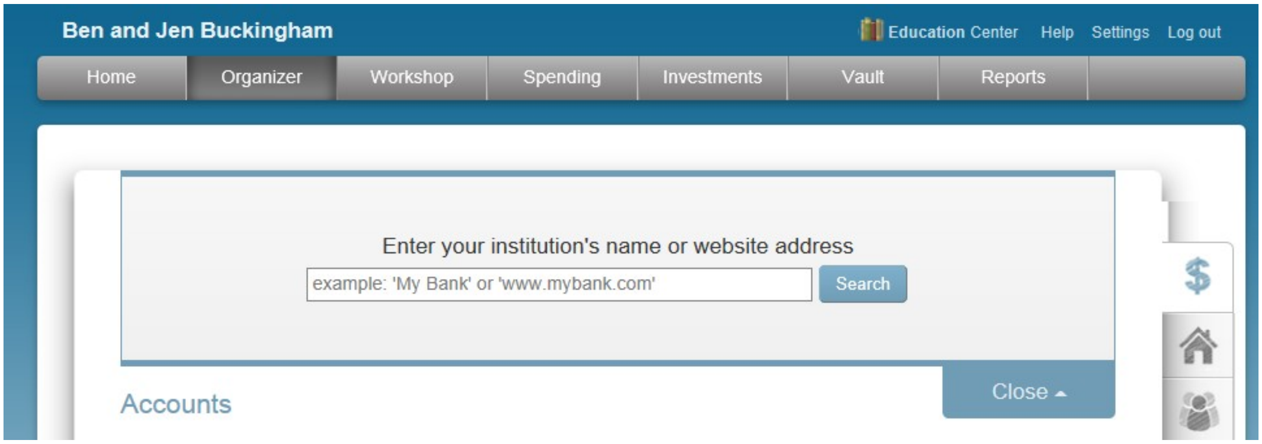
Client Website Connection Guide

This booklet is designed to assist with setting up connections in your Personal Financial View® website.

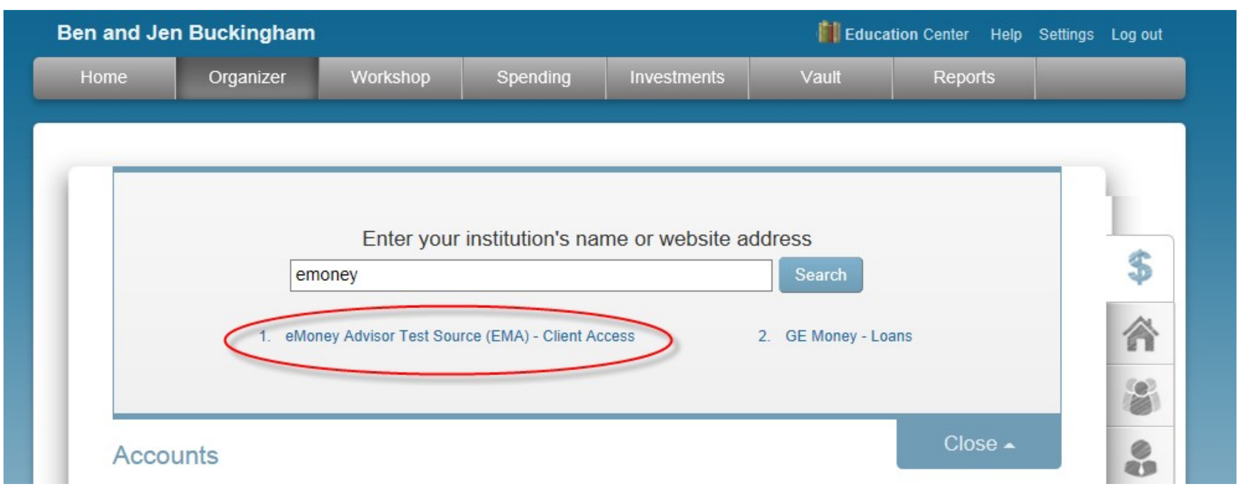
1. Click on **Add** in the **Accounts** section under the **Home** page.



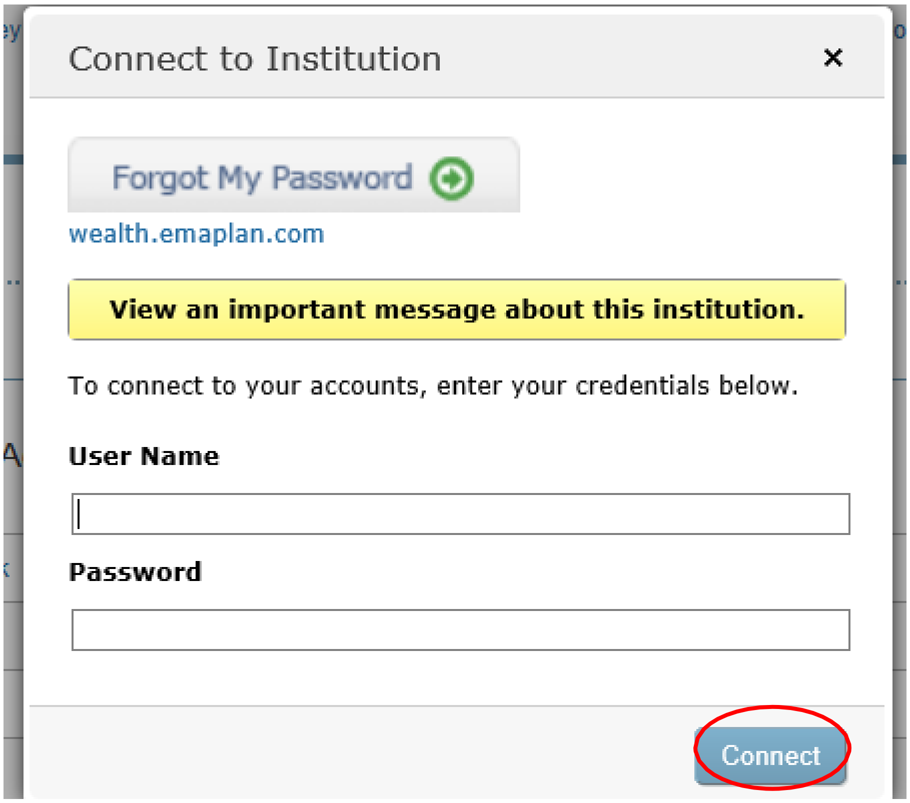
2. Enter in your institution and click **Search**.



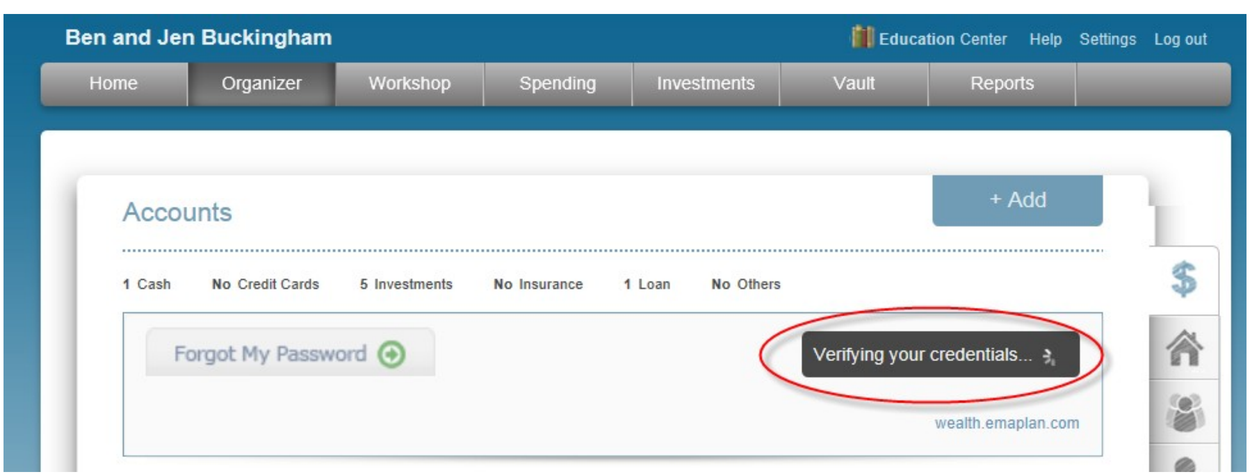
3. From the list, select your institution.



4. Enter your **credentials** and click **Connect**.



NOTE: The system will take a moment to verify and retrieve your information.



5. The account values are pulled through onto the accounts page.

Blue Credit Card	Loan - Credit Card	07/30/2013 01:56PM	-$2,368
Disability Policy	Disability Policy - Group Short Term	07/30/2013 01:56PM	$0
Easy 123 Checking	Cash Equivalent - Checking	07/30/2013 01:56PM	$4,568
Electric Orange	Cash Equivalent - Checking	07/30/2013 01:56PM	$3,000
Fidelity 401(k)	Qualified Retirement - Traditional...	07/30/2013 01:56PM	$40,249
Fidelity Brokerage	Taxable Investment	07/30/2013 01:56PM	$62,684

6. To maintain the connection, see options in the upper right corner.