



LINKING THIRD-PARTY ACCOUNTS
Your Personal Financial Portal





Personalized For You

From your portal, you have access to unique information and insights, account details, your investment dashboard, a document vault, instant access from any of your devices, and more.

Link third-party accounts to your portal with just a few clicks and keep track of your entire financial picture in one place.





Add Accounts

STEP 1

A) Click **Net Worth** to bring up a list of your accounts

B) Click **Add Account** to add a third-party account

ASHTON THOMAS PRIVATE WEALTH

HOME NET WORTH PORTFOLIO TIMELINE VAULT

JOHN

Accounts

\$2,976,153.54
Total Value

4 Accounts

0 Added Institutions

My Accounts: 4

Account Number	Account Name	Custodian	Value	As of Date	Last Updated
> XXXXX7893	Doe Trust Account	Manual Account	2,111,799.58	03/24/2021	02/01/2021
> XXXXX7891	John Doe IRA	Manual Account	586,688.56	03/24/2021	02/01/2021
> XXXXX7894	John & Mary Doe - Joint Account	Manual Account	200,978.63	03/24/2021	02/01/2021
> XXXXX7892	Mary Doe Roth IRA	Manual Account	76,686.77	03/24/2021	02/01/2021

[Add Account](#)

[Collapse All](#)

[Terms of Use](#) [Data Use Statement](#)



Add Accounts

STEP 2

A) Search for your financial institution by name

ASHTON THOMAS PRIVATE WEALTH

HOME NET WORTH PORTFOLIO TIMELINE VAULT

JOHN

Accounts

\$2,976,153.54
Total Value

4 Accounts

0 Added Institutions

My Accounts:

Account Num

> XXXXX789

> XXXXX789

> XXXXX789

> XXXXX789

Connect to your financial institution

Find your institution:

Search

Or choose from these popular institutions:

Bank of America

CHASE

Fidelity

Fidelity NetBenefits

Merrill Lynch
Bank of America Corporation

USAA

Vanguard

WELLS FARGO

Add Account

Collapse All

As of Date	Last Updated
04/14/2021	02/01/2021
04/14/2021	02/01/2021
04/14/2021	02/01/2021
04/14/2021	02/01/2021

B) Or select from the list of commonly-used institutions

Terms of Use Data Use Statement



Add Accounts

STEP 3

ASHTON THOMAS PRIVATE WEALTH

HOME NET WORTH PORTFOLIO TIMELINE VAULT

JOHN

Connect to your financial institution

Enter Credentials for Bank of America
<https://www.bankofamerica.com/>

Online ID * ⓘ
johndoej

Passcode *
••••••••

Cancel **Connect**

A) Verify the URL matches your institution's login

B) Enter your login credentials for the institution

C) Click **Connect** to establish the connection

Accounts

\$2,976,153.54
Total Value

4 Accounts
0 Added Institutions

My Accounts:

Account Num	As of Date	Last Updated
> XXXXX789	04/14/2021	02/01/2021
> XXXXX789	04/14/2021	02/01/2021
> XXXXX789	04/14/2021	02/01/2021
> XXXXX789	04/14/2021	02/01/2021

Terms of Use Data Use Statement



Add Accounts

STEP 4

SHTON THOMAS PRIVATE WEALTH

HOME NET WORTH ▾ PORTFOLIO ▾ TIMELINE VAULT

JOHN ▾

Accounts


\$2,976,153.54
Total Value

4 Accounts

0 Added Institutions

Add Account

My Added Institutions: 0


No Accounts Found!
Please contact your Advisor or click the button above to add an account.

A) Click **Added Institutions** to see third-party accounts

B) The list of added third-party institutions and accounts will appear here

Terms of Use Data Use Statement



FAQ

Third-Party Accounts

Q) What types of accounts can I link?

A) *If you have login credentials for a financial institution and that financial institution shows up using the search feature, you can usually connect any accounts you can normally see by logging into that institution.*


Q) What if I cannot find my financial institution?

A) *Make sure the name is spelled correctly. Some financial institutions use a URL that does not match the name exactly. Also, some small financial institutions may not be available yet. More are always being added.*

Q) Why is my financial institution requiring more information to log in?

A) *Many institutions require you to answer a security question or provide a code to log into their site. These multi-factor authentication tools are provided for your safety and security.*

Q) My link to a third-party account is no longer working. What can I do?

A) *Most accounts links will need to be “refreshed” in time. Simply click on the  gear icon to the right of that account (you may have to scroll right to see it) and enter the credentials required by your financial institution to refresh the account link.*

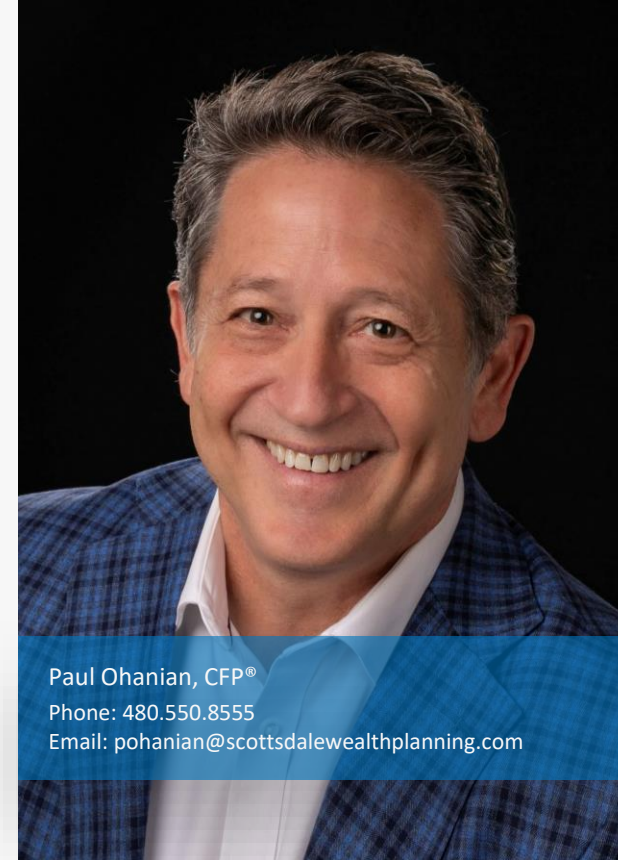
Q) Is my financial information safe?

A) *While no third-party connection be guaranteed with 100% certainty, you are creating a link directly between the client portal and your financial institution using a software tool designed expressly for this purpose. No transactions can be passed to or from your financial institution and no account numbers will ever be displayed. The privacy and information security agreement on the client portal contains more specific information.*



We Are Here to Help

Please don't hesitate to reach out with questions or if needing help setting up your login.



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