Scottsdale Wealth Planning

## 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.

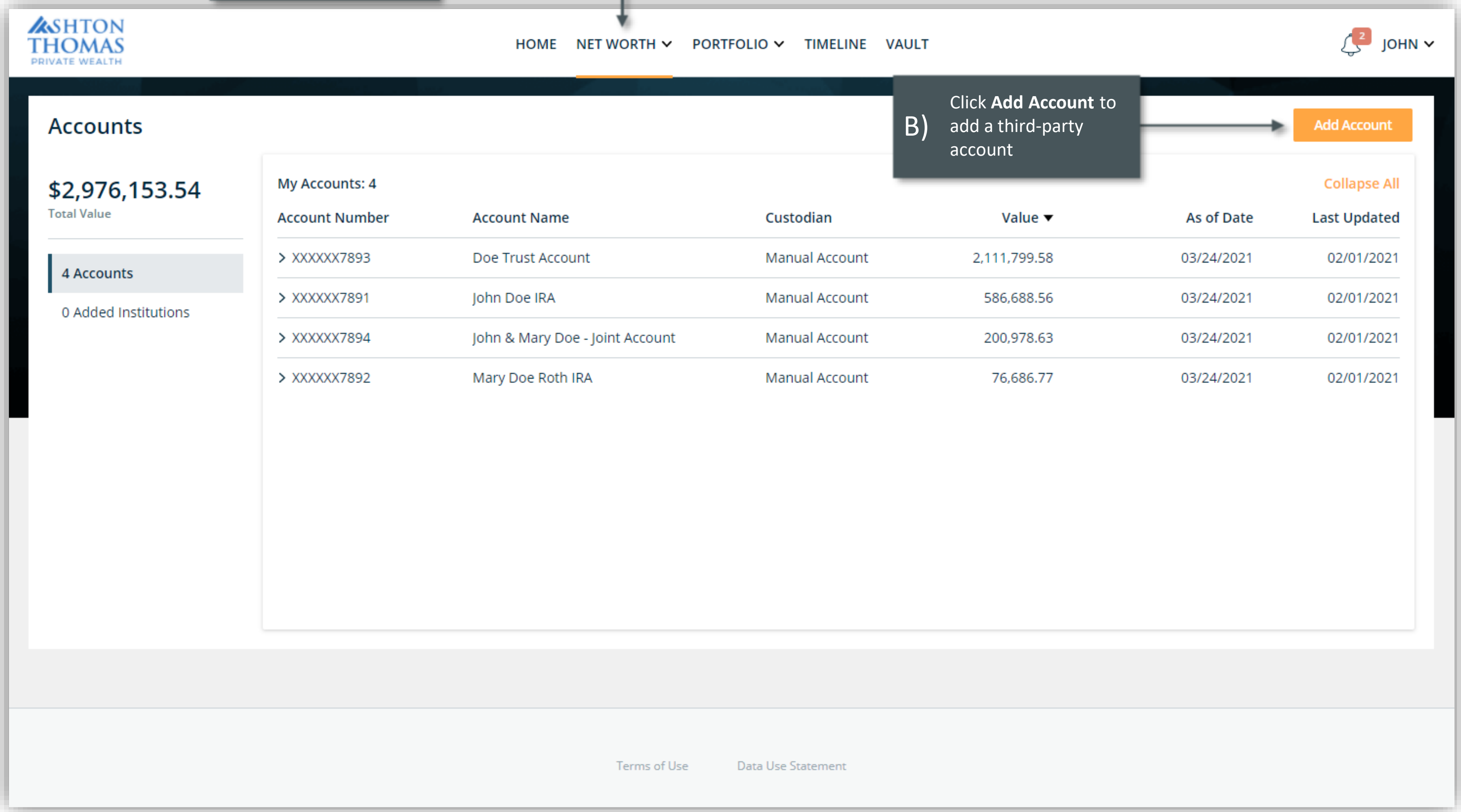
**Link third-party accounts** to your portal with just a few clicks and keep track of your entire financial picture in one place.

# Add Accounts

## STEP 1

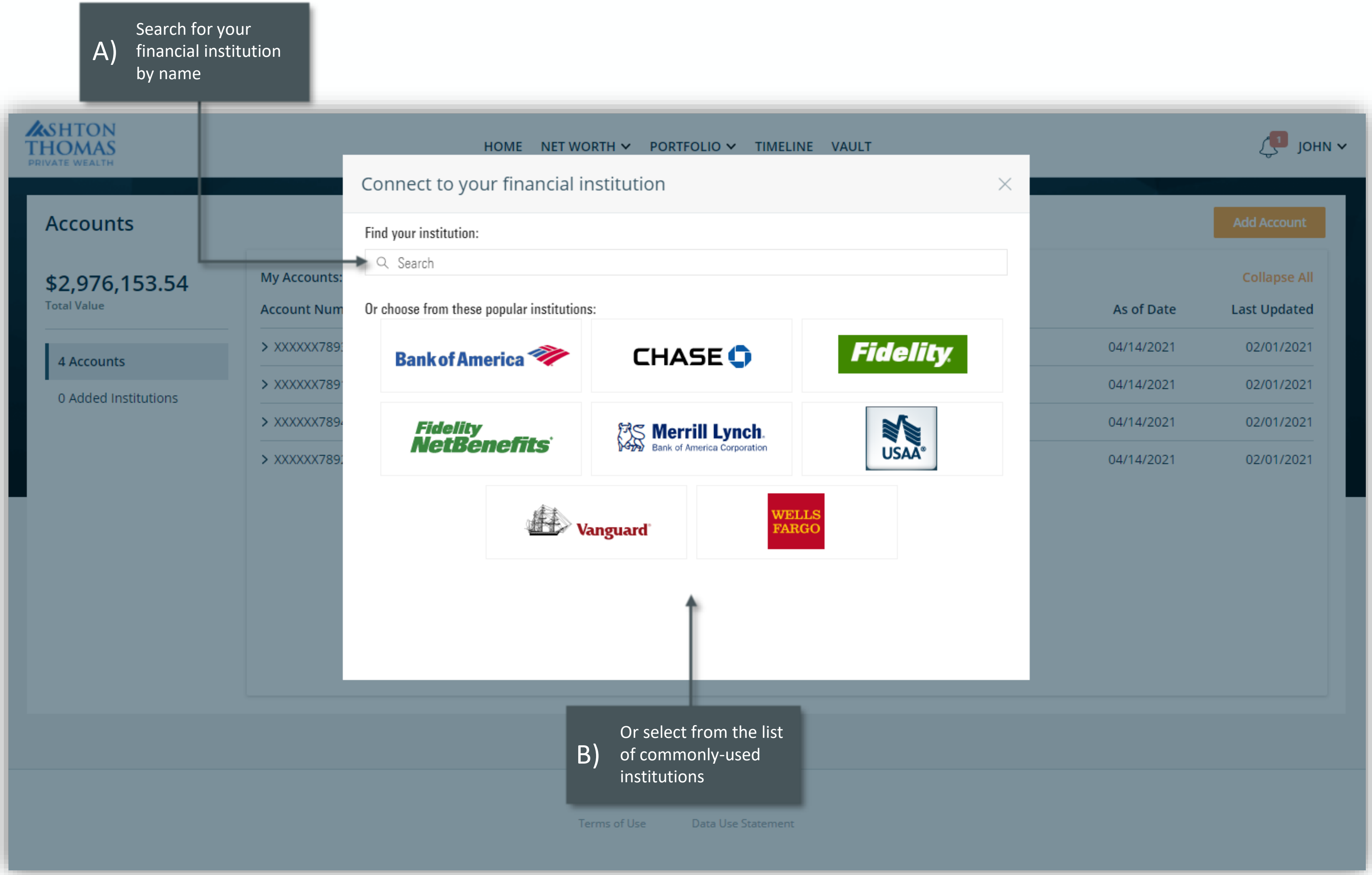
A) Click **Net Worth** to bring up a list of your accounts

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



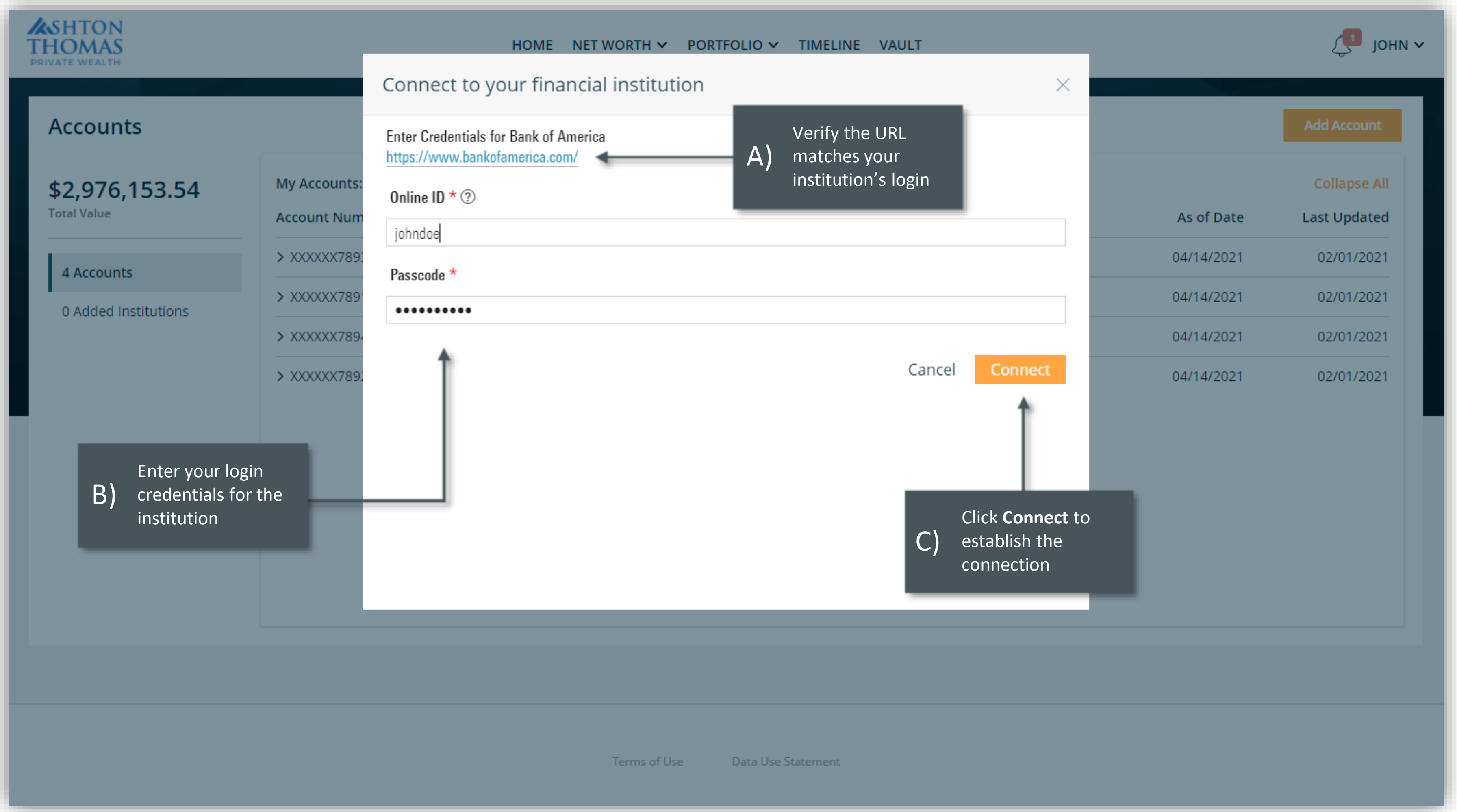
# Add Accounts

**STEP 2**



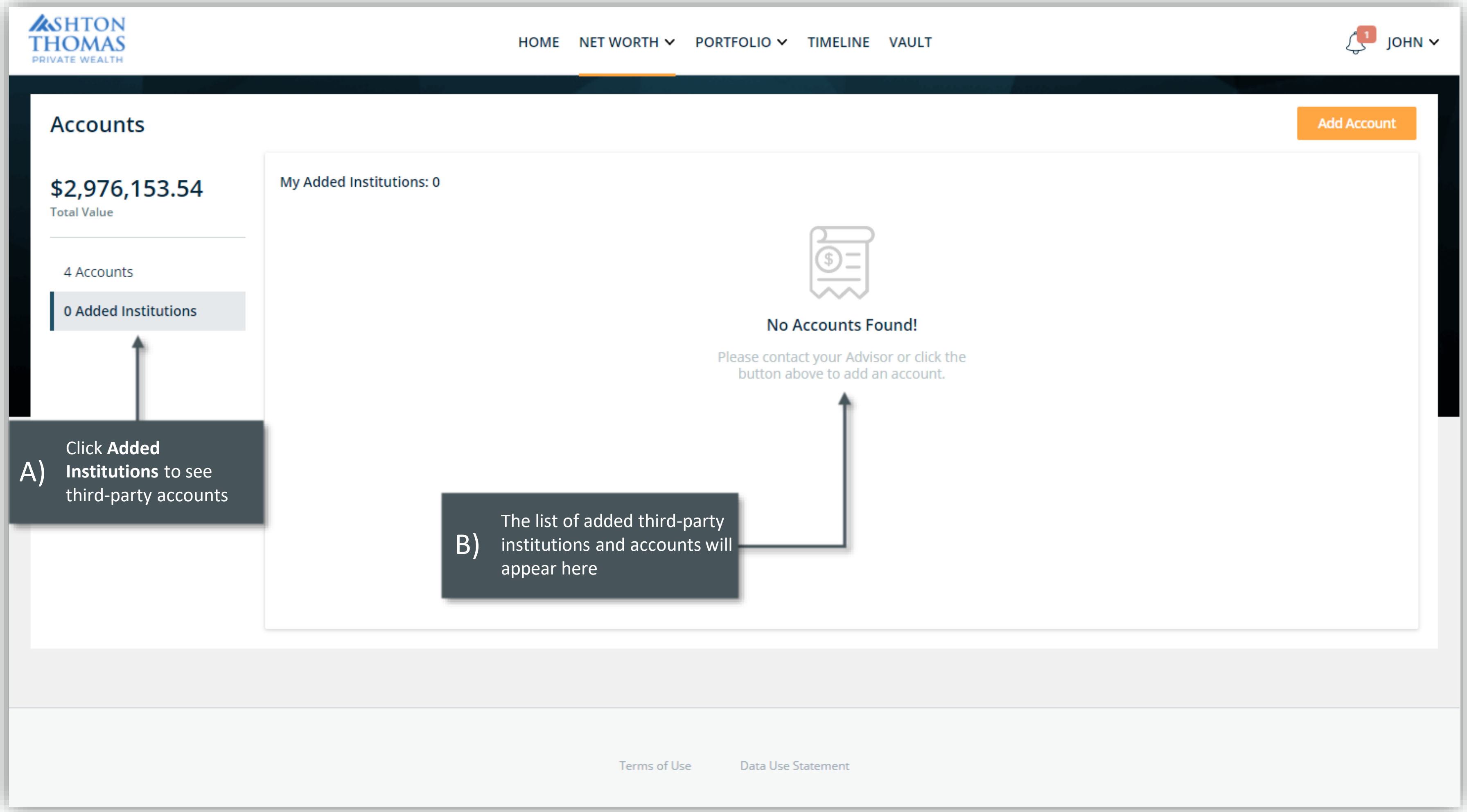
# Add Accounts

**STEP 3**



# Add Accounts

**STEP 4**



# 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 institutional 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.


www.scottsdalewealthplanning.com