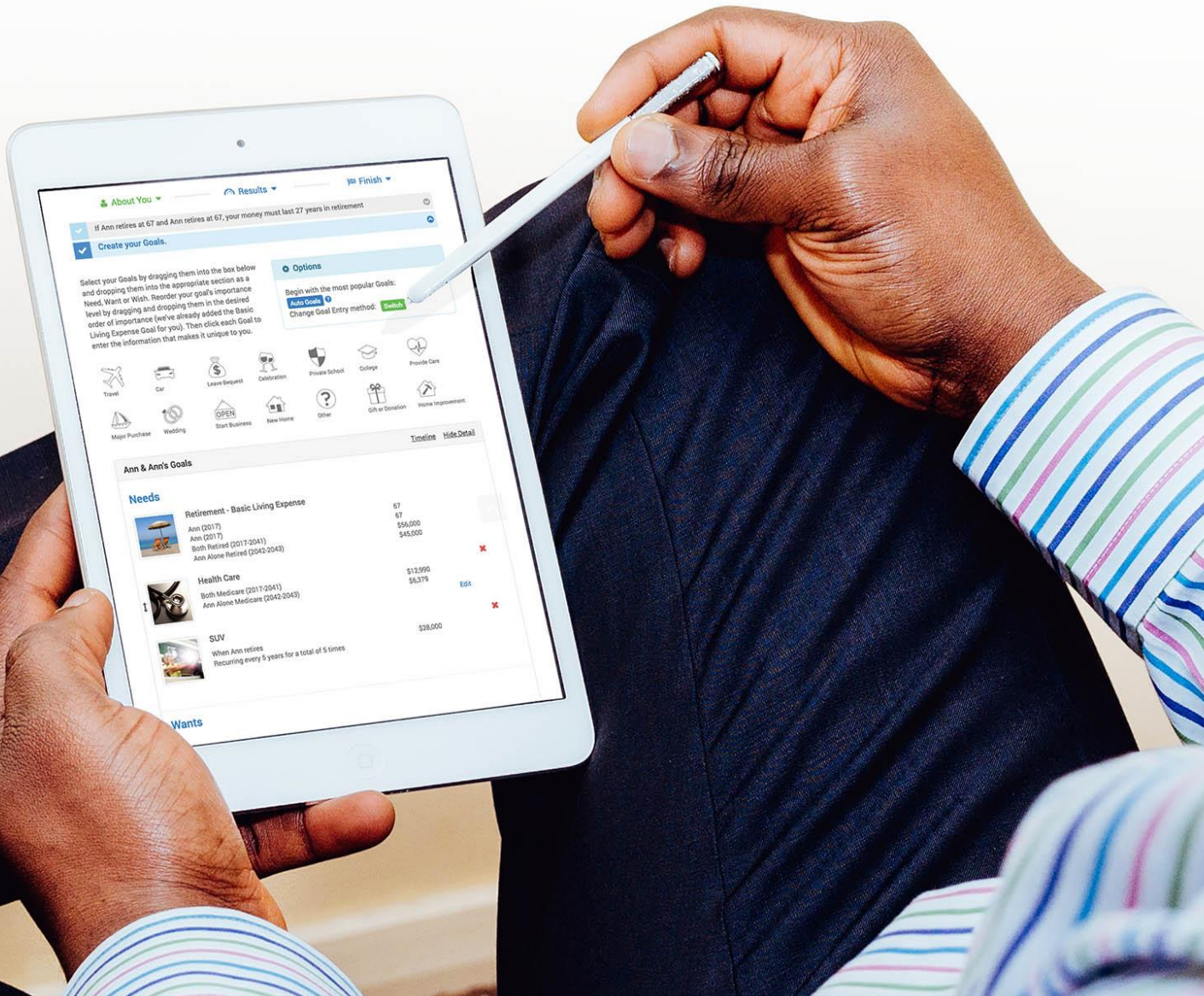




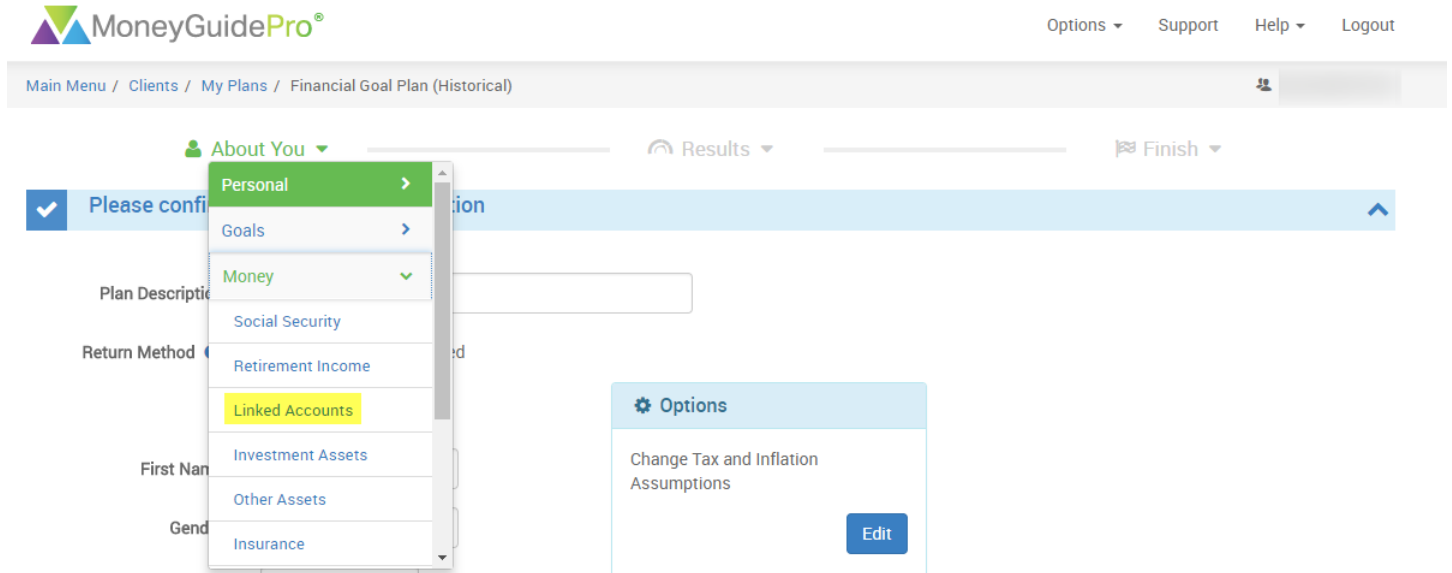
MoneyGuidePro[®]



Yodlee: Adding Accounts

Step 1:

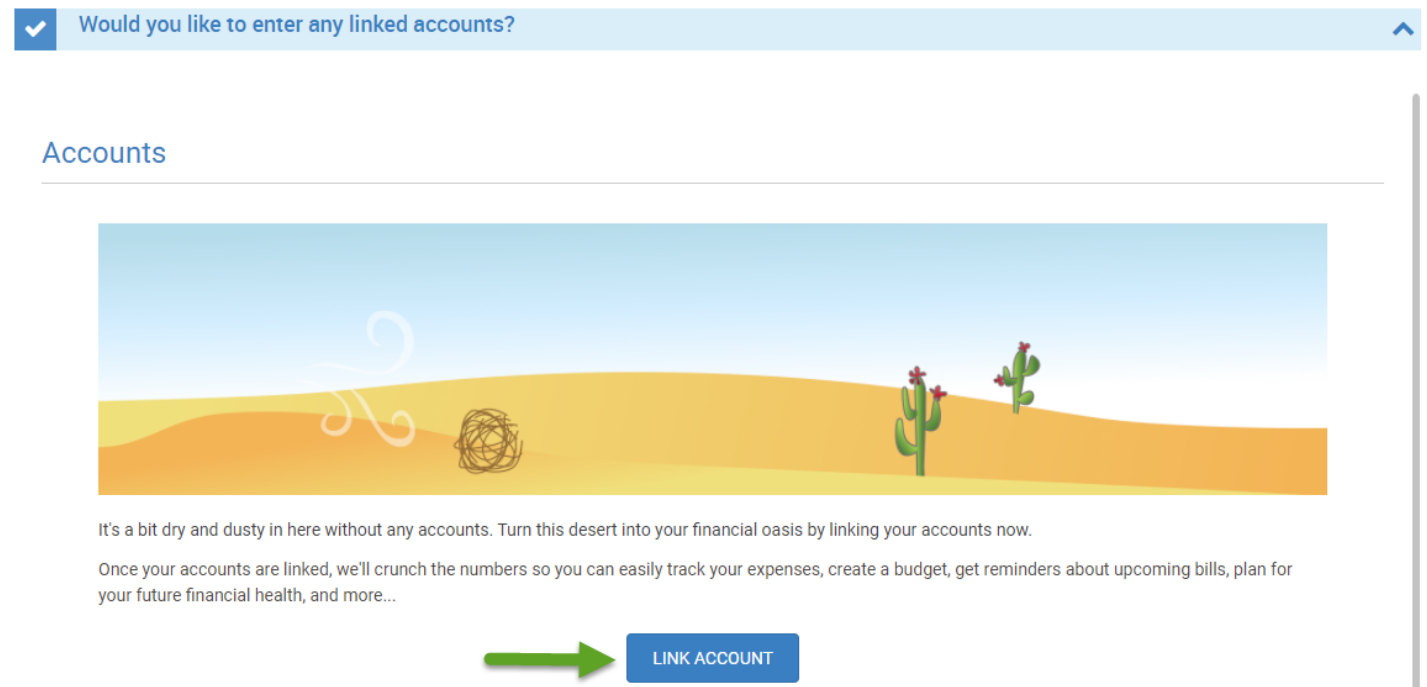
Within the Financial Goal Plan, click **About You > Money > Linked Accounts**. If you cannot see the **Linked Accounts** page, you may need to click **Next** until you get to that section.



The screenshot shows the MoneyGuidePro interface. At the top, there is a navigation bar with "Options", "Support", "Help", and "Logout". Below this is a breadcrumb trail: "Main Menu / Clients / My Plans / Financial Goal Plan (Historical)". The main content area has a "Please configure" header. A dropdown menu is open under "About You", showing options: "Personal", "Goals", "Money", "Social Security", "Retirement Income", "Linked Accounts" (highlighted in yellow), "Investment Assets", "Other Assets", and "Insurance". To the right, there is an "Options" panel with the text "Change Tax and Inflation Assumptions" and an "Edit" button.

Step 2:

Click **Link Account**.



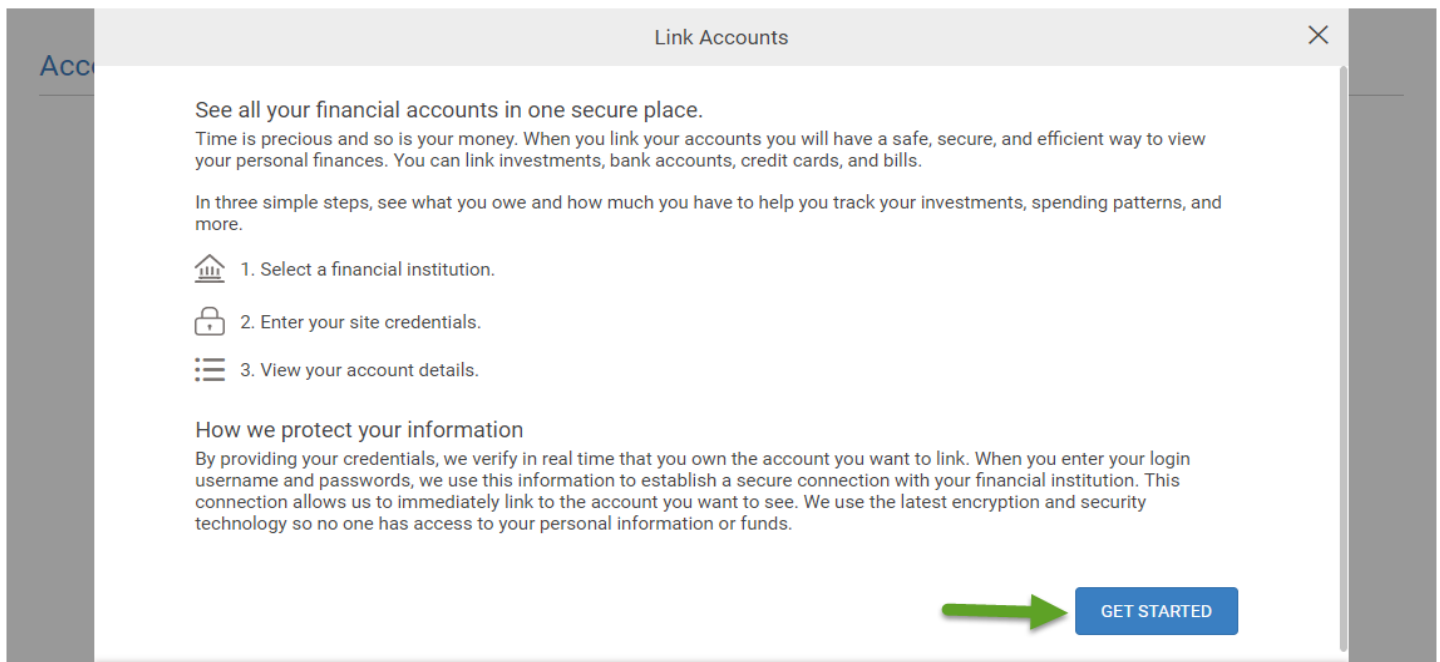
The screenshot shows the "Accounts" section. At the top, there is a question: "Would you like to enter any linked accounts?". Below this is a large illustration of a desert landscape with rolling hills, a cactus, and a globe. The text below the illustration reads: "It's a bit dry and dusty in here without any accounts. Turn this desert into your financial oasis by linking your accounts now. Once your accounts are linked, we'll crunch the numbers so you can easily track your expenses, create a budget, get reminders about upcoming bills, plan for your future financial health, and more...". At the bottom, there is a green arrow pointing to a blue button labeled "LINK ACCOUNT".

< Back

Next >

Step 3:

Click **Get Started**.




Link Accounts

See all your financial accounts in one secure place.
Time is precious and so is your money. When you link your accounts you will have a safe, secure, and efficient way to view your personal finances. You can link investments, bank accounts, credit cards, and bills.

In three simple steps, see what you owe and how much you have to help you track your investments, spending patterns, and more.

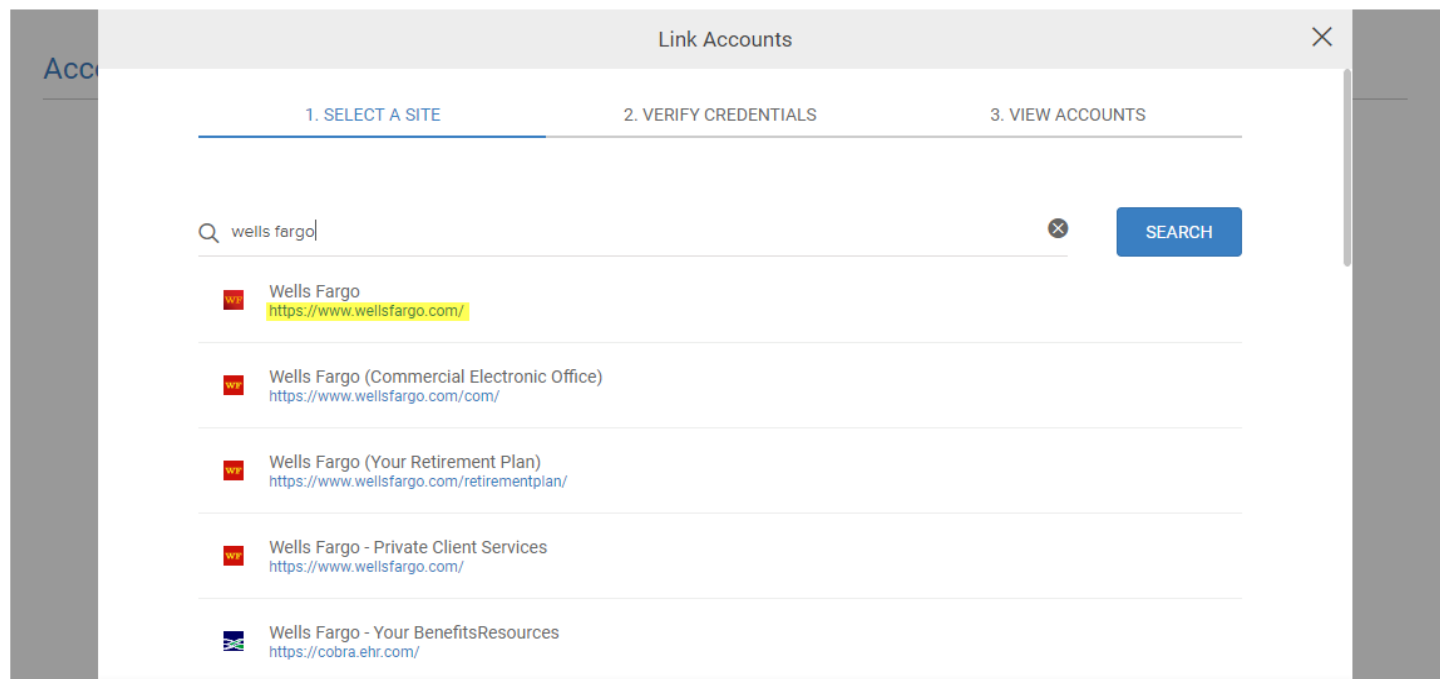
1. Select a financial institution.
2. Enter your site credentials.
3. View your account details.

How we protect your information
By providing your credentials, we verify in real time that you own the account you want to link. When you enter your login username and passwords, we use this information to establish a secure connection with your financial institution. This connection allows us to immediately link to the account you want to see. We use the latest encryption and security technology so no one has access to your personal information or funds.

 **GET STARTED**


Step 4:






Type in the name of the institution. Please note that there may be multiple institutions with similar names. You can verify that you are adding the correct site by checking the URL located below the name of the institution; if the URL matches the URL that you use when accessing your accounts online, then you are adding the correct institution.



Link Accounts

1. SELECT A SITE 2. VERIFY CREDENTIALS 3. VIEW ACCOUNTS

Q wells fargo  **SEARCH**

-  Wells Fargo
<https://www.wellsfargo.com/>
-  Wells Fargo (Commercial Electronic Office)
<https://www.wellsfargo.com/com/>
-  Wells Fargo (Your Retirement Plan)
<https://www.wellsfargo.com/retirementplan/>
-  Wells Fargo - Private Client Services
<https://www.wellsfargo.com/>
-  Wells Fargo - Your BenefitsResources
<https://cobra.ehr.com/>


Step 5:

Once you have selected the account you want to add, enter all requested information and click **Submit** at the bottom of the window. Please note that you may need to scroll down to see the **Submit** button.

Link Accounts ×

Please enter your **Wells Fargo** online account credentials.

LOG IN TO YOUR ACCOUNT


Wells Fargo
www.wellsfargo.com

Username

Password

 SHOW

Re-enter Password

< BACK
SUBMIT >

TIPS

TROUBLE LINKING ACCOUNTS?

Don't have your login? [Visit your financial institution's site](#) to retrieve or create your username and password. This will open a new window.

TRUSTED SECURITY ▼

Step 6:

Once the financial institution is aggregated, the individual accounts and balances will be displayed. You can scroll down and click **All Done** to review the accounts or click **Link Another Site** to add a new institution.

Link Accounts ×

1. SELECT A SITE
2. VERIFY CREDENTIALS
3. VIEW ACCOUNTS

Congratulations! You have successfully linked your account(s). ✓

Dag Site

BANKING

TESTDATA	\$44.78
Checking 	

TESTDATA1	\$9,044.78
Savings 	

CREDIT CARDS

Super CD Plus	\$11,756.88
Credit Card 	

INVESTMENTS

TIPS

ACCOUNT TYPES

You can link all sorts of accounts. Some examples are:

- Checking
- Savings
- Credit Card
- Rewards
- Investments
- Retirement
- Bills (e.g., utilities, cable, phone, insurance)

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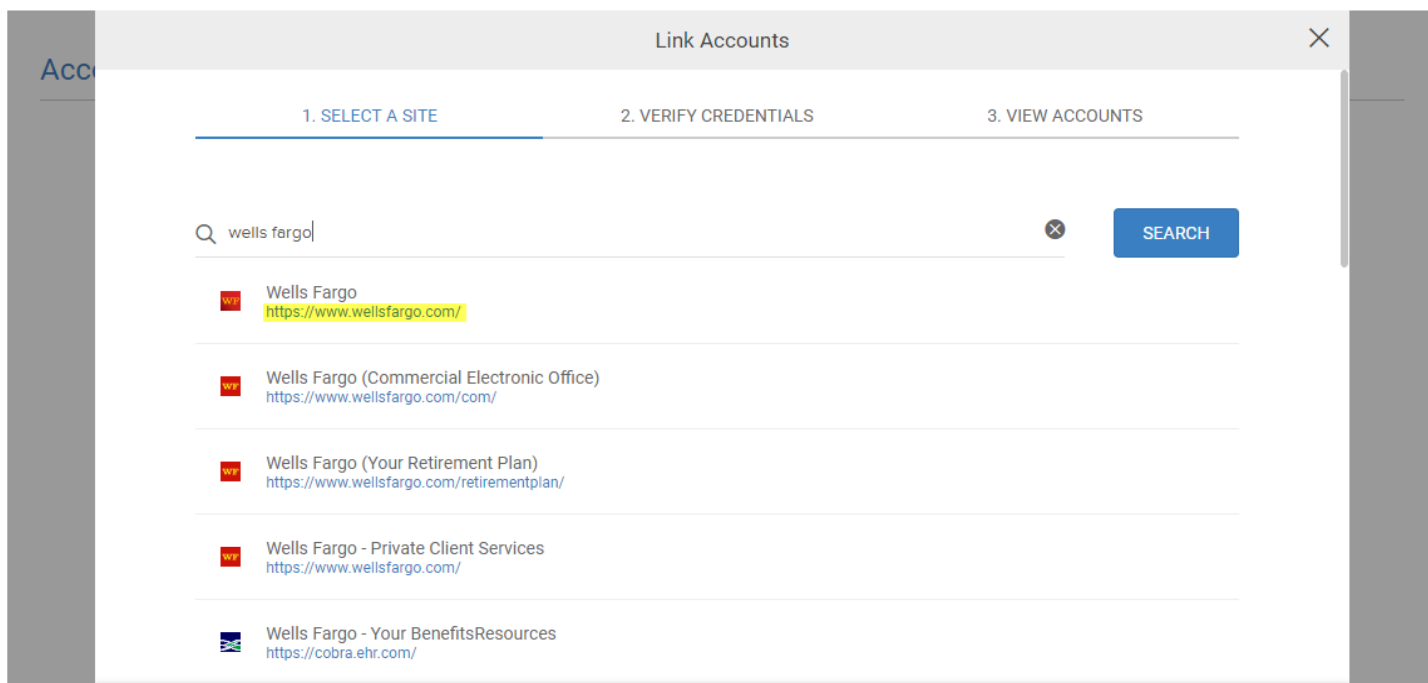
Yodlee

Page 4

Common Errors

402 error:

This error appears for a number of reasons, but more than likely it is because a) you are adding the wrong financial institution site in Yodlee, or b) the username and/or password is incorrect. Please confirm you are adding the correct site by checking the URL that appears below the site name. If you click on the URL and your credentials are accepted at the end site, the site you are adding in Yodlee is correct.



403, 412 and 413 errors:

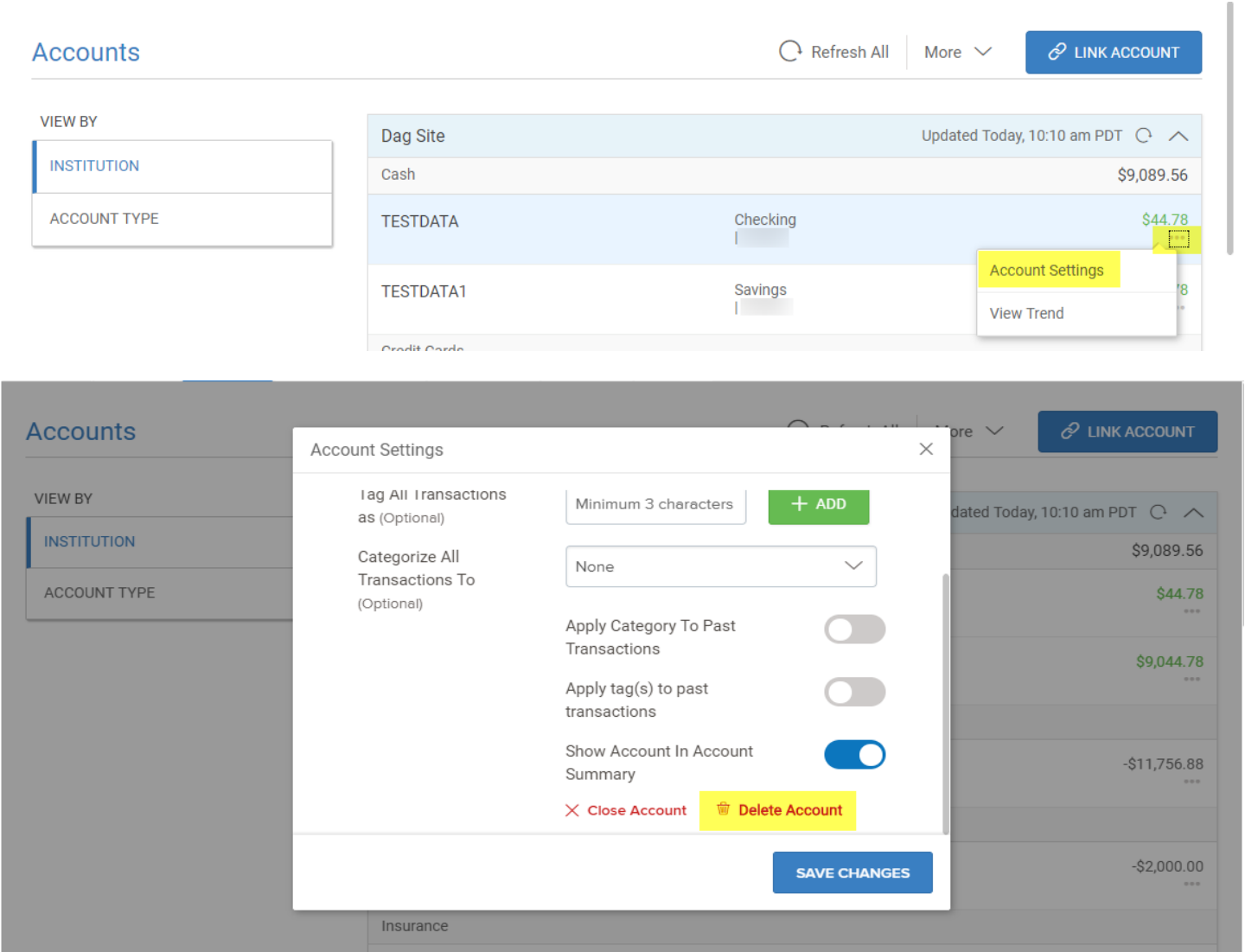
This is often due to variations of the financial institution's site. Please reach out your advisor for additional support.

518 error:

This is due to incorrect security questions and/or unanswered security questions. For example, if the site you are trying to add asked you to create five security questions, Yodlee will need all five security questions answered before the account can be successfully added. However, you may not be asked all of the security questions you created when adding the account within Yodlee. Therefore, please hover your mouse over the **red triangle** next to the institution in question, click **Edit Credentials**, click **Submit** at the bottom of the page and answer the prompted security questions. Complete these steps until all security questions have been prompted and answered.

Other Tips

To delete an account you have added, click the **ellipsis** below the account balance and click **Delete Account** at the bottom of the page (please note that you may need to scroll down the page to see the **Delete Account** button).



The screenshot shows the 'Accounts' page in MoneyGuidePro. At the top, there are options to 'Refresh All', 'More', and a 'LINK ACCOUNT' button. Below this, there are filters for 'VIEW BY' (INSTITUTION and ACCOUNT TYPE) and a table of accounts. The table lists accounts like 'Dag Site', 'Cash', 'TESTDATA', and 'TESTDATA1' with their respective balances and account types. A dropdown menu is open for the 'TESTDATA' account, showing 'Account Settings' and 'View Trend' options. A second screenshot shows the 'Account Settings' dialog box with options to 'Tag All Transactions as (Optional)', 'Categorize All Transactions To (Optional)', and toggle switches for 'Apply Category To Past Transactions', 'Apply tag(s) to past transactions', and 'Show Account In Account Summary'. At the bottom of the dialog, there are buttons for 'Close Account', 'Delete Account', and 'SAVE CHANGES'.

Some sites may appear as if they are not working even if the credentials are correct because there was a recent change to the financial institution's site that needs to address (for example, there may be a pop-up message when you login to the end site asking you to confirm your email address or address an advertisement). To resolve this, please login to the financial institution's site and address any pop-up messages.