

STEP 1- Log in and select initial avatar at the top right corner of your screen

Overview Portfolio Activity

Good morning.

Your Advisor
Advice & Planning Services

Total Balance ⓘ

Cash 5.10% APY

Transfer funds TS

Total balance:

[View](#)

Managed accounts ⓘ

Total balance:

[View](#)

STEP 2- Select "Settings"

Overview Portfolio Activity

Good morning.

Your Advisor
Advice & Planning Services

Total Balance ⓘ

Cash 5.10% APY

Settings

Documents

Legal

Logout

STEP 3- Select "Accounts"

Overview Portfolio Activity

Settings

Transfer funds TS

Profile

Accounts

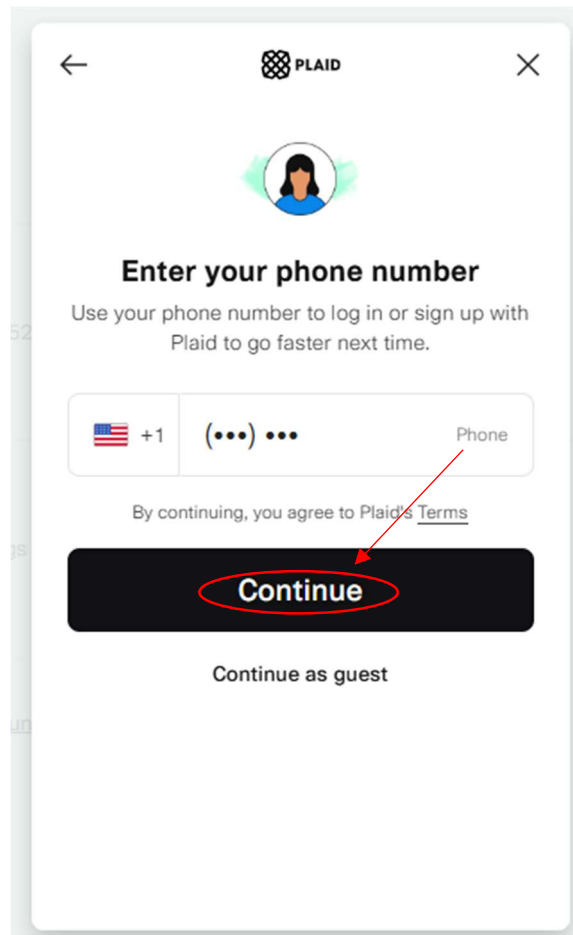
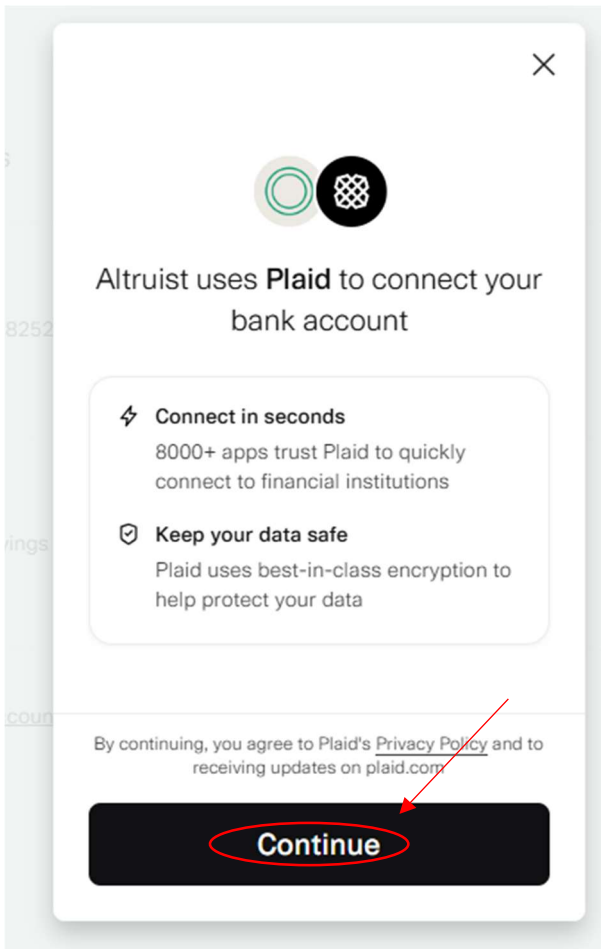
STEP 4- Select “Add Funding Account”

Funding accounts

Remove

Remove

+ Add Funding Account



STEP 5- Finish the process by following what Plaid prompts you to do. You will need your login information for your online banking. If you do not have online banking, follow the steps above. The next screen you see will have option of banks to choose from. Scroll to the very bottom and select “Add with Routing and Account Numbers.”