

ADDING ADDITIONAL ACCOUNTS IN YOUR CLIENT PORTAL



FAMILY WEALTH
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CONCURRENT

AGGREGATE YOUR ACCOUNTS IN YOUR CLIENT PORTAL

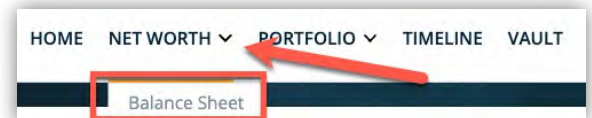
One of the great features of your new portal is your ability to integrate your other financial accounts into your portal to track your net worth. Accounts can include 401(k), Investment Accounts, Mortgages, Credit Cards, Bank Accounts, Auto Loans, and many more. All you need is your login username and password to those outside institutions to safely and securely connect those accounts to your portal.

Step One:

- Log into your personal Client Portal using your desktop or laptop computer through the Client Access tab on famwealthsolutions.com, or through the app available on Apple or Android devices.

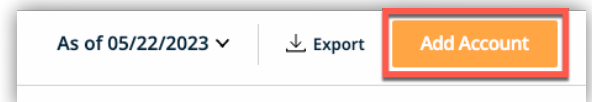
Step Two:

- Select the **Net Worth** workspace at the top of the home page and then select Balance Sheet. If using the mobile app, select the menu button in the top left and select **Net Worth**.



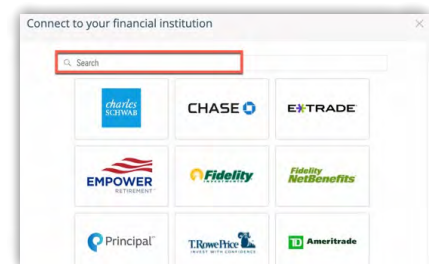
Step Three:

- Select the **Add Account** button at the top right of the Balance Sheet page or the “Plus” sign in the top right, if using the mobile app.



Step Four:

- On the “Connect to your financial institution” window, click on the logo to connect any of the most common institutions used or use the Search bar and enter in the name of your other institutions, not shown. If prompted, click the **Connect** button after reading the message on this page.



Step Five:

- Lastly, type in your credentials to that outside institution. You may need to enter in additional verification codes or answer security questions, depending on the security settings of that outside financial institution.
- If successful, your account will be added to your client portal and viewable whenever you log into your portal on your desktop or mobile devices.
- Continue with Steps Three to Five until you have entered in all the financial institutions you wish to view in your portal and share with your financial team.

