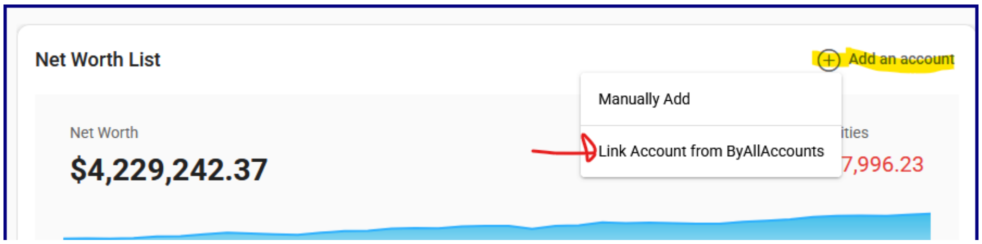
Account Linking Guide

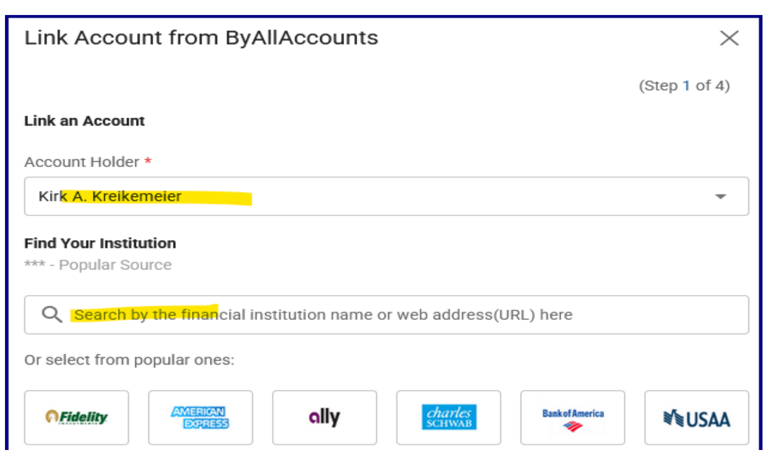
PVWM Portal account linking steps

NOTE: Do not link PVWM Managed Accounts (i.e. Schwab, Altruist, managed 401k accounts).

1) Log in to Client Portal
2) From Home page in Net Worth widget click the Add an Account button and select 'Link Account from ByAllAccounts' (PLAID coming soon; select if available) and follow instructions below.



- **Link Account from By All Account Steps (or Plaid when available)**
  - Select Account Holder
  - Find your Institution by searching the financial institution name or URL used when you log into the account. The *** reflects more common source. If unsure, click on related link in dialogue box to verify correct site.
  - Hit Next to complete connection setup. This will launch a new window bringing you into the financial institution login page
  - Agree to any Terms and Conditions (if applicable) and enter credentials
  - Select Accounts associated with these credentials for aggregation
  - Save
  - Once account displays on Net Worth List (may take couple days), click account and update Name. If it doesn't save, provide PVWM with preferred titling.
    - **NOTE:** There are known issues when trying to link Treasury Direct so refrain from linking at this time. Please manually add instead (see next).
    - **NOTE:** If Account Holder shows letters rather than name, Cancel, refresh screen, select Add an Account again.
    - **NOTE:** Let us know of any duplicate accounts and we will delete



3) If the institution is unavailable or account cannot be linked, go back to the Add an Account button and select 'Manually Add' and follow instructions below.

- **Link Account by Manually Adding Steps**
  - Select the Account type you are trying to add. Common types would be:
    - Investment Account- unmanaged brokerage, retirement or health savings accounts
    - Bank Accounts- checking, savings or money market accounts
    - Real Estate- primary home, vacation or investment properties
    - Credit Cards- any credit card balances (not needed for PVWM but can link if wish)
  - Enter the Name of the account, select the Type, add owners, date and current market values

Mobile Account linking steps

1) If haven't already, go to App Store and search for myAdvisorLink. Download app as instructed.
2) Open Mobile Client Portal app by logging in using your Web Portal username and password
3) Click +Link Account from ByAllAccounts (PLAID coming soon; select if available) at the top of the screen
4) Choose Account Holder (Note: if Account Holder shows letters try refreshing screen)
5) Find your Institution by searching for the financial institution name or URL used when you log into the account
6) Agree to any Terms and Conditions (if applicable) and enter credentials
7) Select Accounts associated with these credentials for aggregation
8) Save
   a. **NOTE:** The Client Portal Mobile App does not support manually adding accounts at this time

Fixing connection issues in the Client Portal

1) Log in to the Client Portal
2) Select the Profile page on the left side
3) Go to the Synced Accounts tab
4) Select the Connection to open and update credentials
   a. **NOTE:** if recently linked and status is pending give it another day or two as connections can take a few days before they show up correctly on the Home Page
   b. **NOTE:** If original link was through By All Accounts and Plaid now available, go to beginning of this document and establish link via PLAID. Then contact PVWM and we will delete old By All Accounts link.