

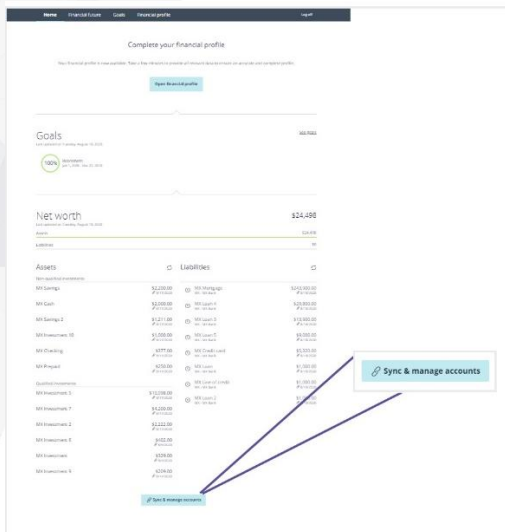
Resyncing accounts

Instructions for linking accounts to the financial profile

To offer the best experience for you, we have improved the functionality to sync your financial institutions directly to your financial profile. This enhancement requires that you resync the accounts that you have in your financial plan. Follow this short guide to resync your accounts. If you prefer, please click [here](#) to watch a [video tutorial](#).

Sync & manage accounts

1. On the **Home** page of your financial profile, scroll to the bottom to find the **Sync & manage accounts** button.



2. Select your institution using the search feature or by selecting from a list of popular options on the screen.

The screenshot shows the 'Manage Connections' section of the NaviPlan interface. On the left, there is a 'Know Your Finances' section with a building icon and the text 'See all your accounts, including those with other financial institutions.' On the right, the 'Select your Institution' section features a search bar and a list of 'Most Popular' institutions:

- Bank of America (<https://www.bankofamerica.com/>)
- Chase Bank (<https://www.chase.com/>)
- American Express Credit Card (<http://www.americanexpress.com>)
- Discover Credit Card (<https://www.discover.com>)
- Wells Fargo Advisors - Client Login (<https://www.wellsfargoadvisors.com/online-access/signon.htm>)
- Wells Fargo (<https://www.wellsfargo.com>)
- US Bank (<https://www.usbank.com/index.html>)
- Citibank (<https://online.citi.com>)
- Fidelity 401k (<https://rb.fidelity.com/public/rb/401k/home>)

3. Enter your login credentials for your financial institution. Click **Connect**.

The screenshot shows the MX Bank login form. At the top is the MX logo. Below it, the text 'MX Bank' and the URL 'https://www.mx.com' are displayed. The form contains two input fields: 'Username' and 'Password'. A 'Show' link is positioned to the right of the password field. A blue 'Connect' button is located below the input fields, and a 'Go back' link is positioned below the button.

MX Investment 4 (Closed)
\$0.00

MX Investment 3 (Hidden)
\$1,000.00

MX Investment 2
\$4,390.00

MX Investment 5
\$10,098.00

MX Loan 3
\$13,900.00

- It will verify credentials. This can take a few seconds. Then, your accounts will automatically sync to your financial profile. Click **Continue**.

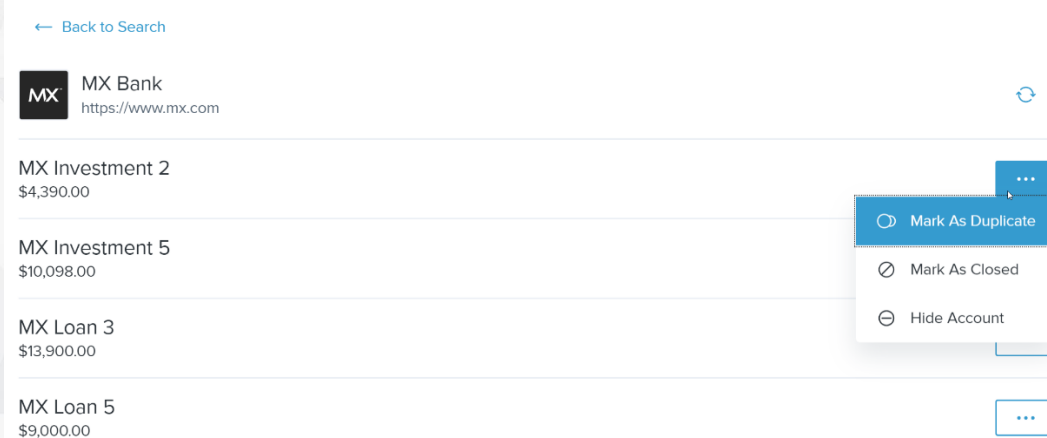
The screenshot shows the 'Manage Connections' section of the NaviPlan interface. On the left, under 'Outside Accounts', there is a card for 'MX Bank' with the text '25 Accounts Connected'. On the right, a modal window displays the MX Bank logo, the URL 'https://www.mx.com', a green checkmark, and the message 'You have successfully connected MX Bank'. A blue 'Continue' button is located at the bottom of the modal.

- This will take you back to the search function. If necessary, add additional financial institutions using the same process as Steps 2-4.
- Click on the financial institution name on the left to review individual accounts.

The screenshot shows the 'Manage Connections' section of the NaviPlan interface. On the left, under 'Outside Accounts', there is a card for 'MX Bank' with the text '25 Accounts Connected'. A mouse cursor is hovering over this card. On the right, a list of accounts is displayed, each with a three-dot menu icon to its right. The list includes:



- MX Investment 2: \$4,390.00
- MX Investment 5: \$10,098.00
- MX Loan 5: \$9,000.00
- MX Loan 3: \$13,900.00
- MX Loan 4: \$29,800.00
- MX Investment 7: \$4,200.00
- MX Investment 10: \$1,000.00
- MX Savings: \$2,200.00
- MX Investment 9: \$209.00
- MX Checking: \$377.00

7. Clicking  on the right of each account will bring up a menu to manage that specific account.



← Back to Search

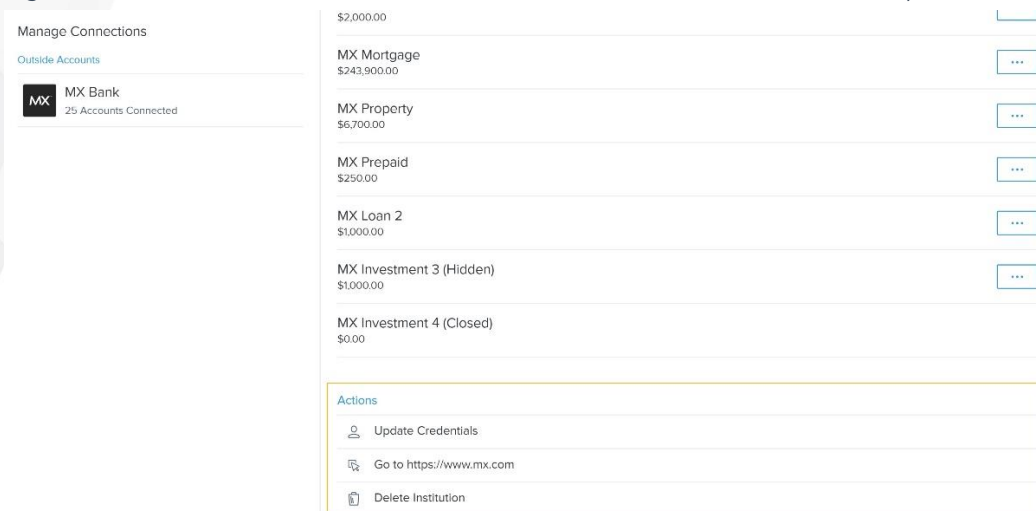
MX Bank
https://www.mx.com

| | |
|--------------------------------|---|
| MX Investment 2 \$4,390.00 |  |
| MX Investment 5 \$10,098.00 | |
| MX Loan 3 \$13,900.00 | |
| MX Loan 5 \$9,000.00 |  |

Menu options:

- Mark As Duplicate
- Mark As Closed
- Hide Account







8. Scroll to the bottom of the page to find an **Actions** menu to manage all accounts for that financial institution. Here, you can update your login credentials, visit the website of the financial institution, or delete it from your list of synced accounts.



Manage Connections

Outside Accounts

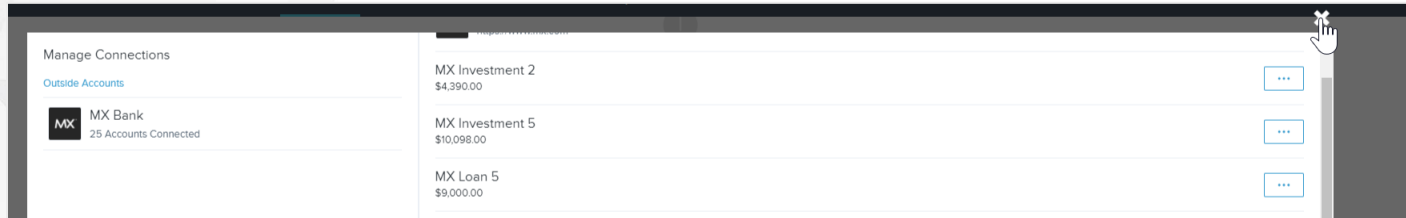
MX Bank
25 Accounts Connected

| | |
|--|---|
| \$2,000.00 |  |
| MX Mortgage \$243,900.00 |  |
| MX Property \$6,700.00 |  |
| MX Prepaid \$250.00 |  |
| MX Loan 2 \$1,000.00 |  |
| MX Investment 3 (Hidden) \$1,000.00 |  |
| MX Investment 4 (Closed) \$0.00 | |

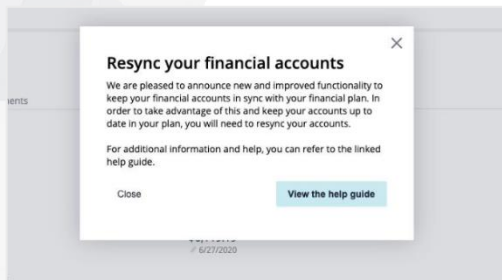
Actions

- Update Credentials
- Go to https://www.mx.com
- Delete Institution

9. Use the X in the upper right to return to your financial profile after successfully syncing all your financial institutions.



10. Next time you log into your financial profile, be sure to dismiss the message about resyncing accounts as you have now successfully synced your accounts.



After resyncing your accounts, you will continue to enjoy the benefit and ease of having your financial institutions linked directly to your financial profile.