

Linking Accounts in Insights

1) On Desktop: Select the ellipsis (three dots) on the toolbar





3) Select one of the eight default financial institutions listed or use the search bar to search for your bank.

| × ! State |
|------------------------|
| bank |
| BANK OF AMERICA |
| citi |
| |
| AMERICAN |
| |

4) After agreeing to the terms and conditions, the user will be brought to a login screen hosted by the financial institution that the user is attempting to aggregate accounts from.





5) Once the user is able to access their financial institution, they will select which accounts they would like to aggregate by clicking the box next to each account.

| ← share using Fini ◆ Finba | ank | ← shart ¢F | using Princety inbank |
|--------------------------------------|----------------|------------------------------|--------------------------|
| Eligible accounts | | Eligible accounts | |
| Auto Loan -\$512.35 | Ending in 8888 | Auto Loan -\$512.35 | Ending in 8888 |
| Home Mortgage -\$512.35 | Ending in 5555 | Home Mortgag | e Ending in 5655 |
| Roth IRA \$512.35 | Ending in 4444 | ✓ Roth IRA \$512.35 | Ending in 4444 |
| Brokerage \$512.35 | Ending in 0000 | Brokerage \$512.35 | Ending in 0000 |
| Line of Credit -\$512.35 | Ending in 6666 | Line of Credit -\$\$12.35 | Ending in 6666 |
| Credit Card \$512.35 | Ending in 7777 | Credit Card \$512.35 | Ending in 7777 |

6) After selecting the accounts they would like to aggregate, they will be able to review the accounts they selected and complete the process by clicking "Submit".

| Revie | w your accounts | |
|-----------|--------------------------------|---|
| \dd all a | accounts before sharing. | |
| | Add another bank | |
| @ | FinBank 3 accounts selected | > |
| 0 | Connected | |
| | | |
| | | |