

YOUR INTEGRAL WEALTH PORTAL

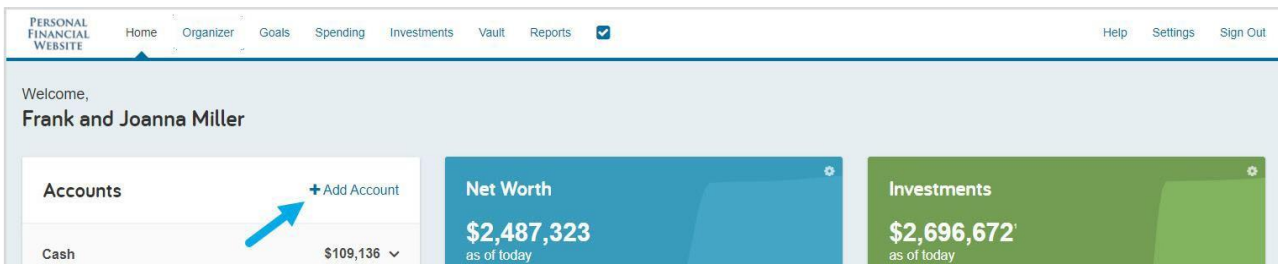
Adding Accounts

In this user guide, we will demonstrate how to add both connected accounts and manual accounts.

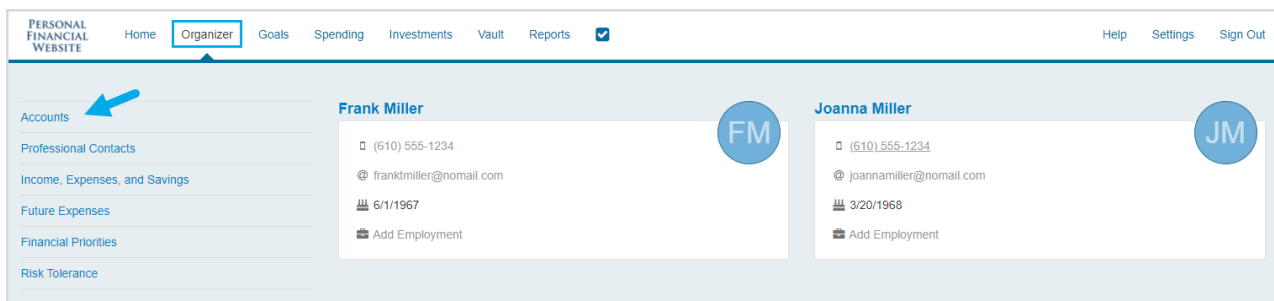
Establishing connections to your personal banking institutions will allow your account information to be updated automatically. If you do not have an online login to an institution, you can enter your accounts manually. While manual accounts do NOT update, they help build a better financial snapshot for both you and Colman Knight.

Adding Connected Accounts

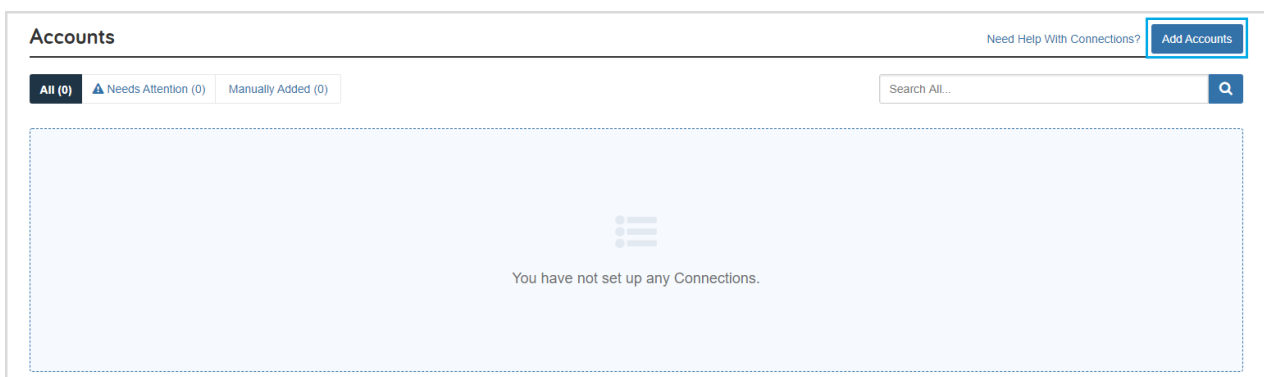
1. From your Home page, click **Add Account**.



You can also click **Organizer** on the menu, then click **Accounts**.

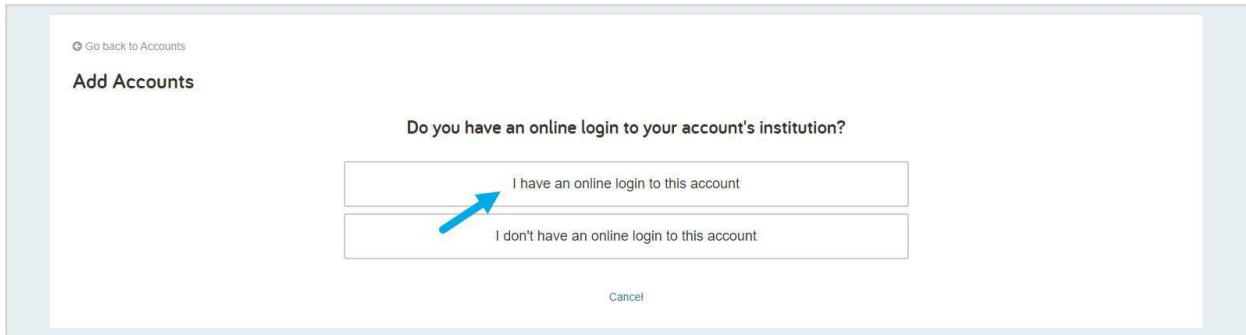


2. Click **Add Accounts**.



Adding Accounts

3. Click **I have an online login to this account**. (Manual entry is explained in the next section.)



Go back to Accounts

Add Accounts

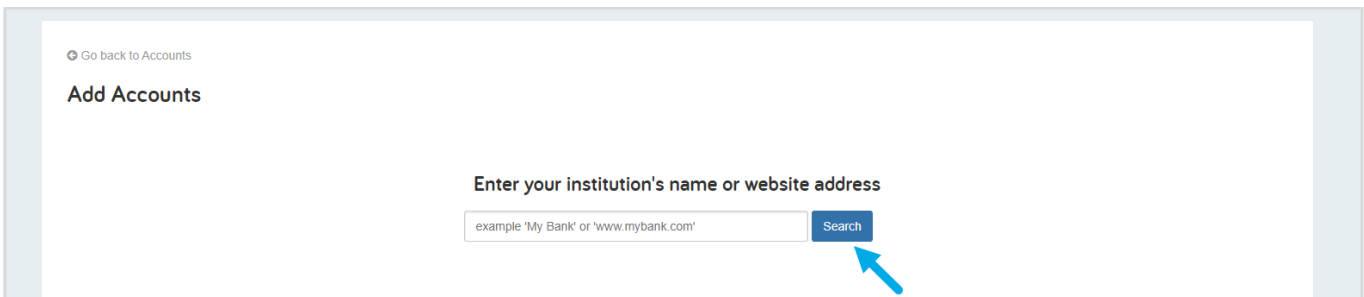
Do you have an online login to your account's institution?

I have an online login to this account

I don't have an online login to this account

Cancel

4. Enter the name of the institution or website address, then click **Search**.



Go back to Accounts

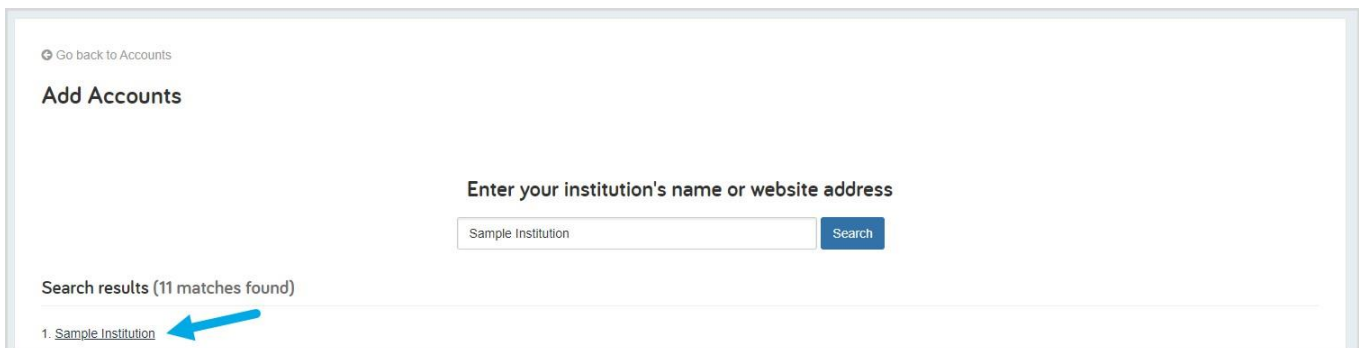
Add Accounts

Enter your institution's name or website address

example 'My Bank' or 'www.mybank.com'

Search

5. Select the connection from the search returns.



Go back to Accounts

Add Accounts

Enter your institution's name or website address

Sample Institution

Search

Search results (11 matches found)

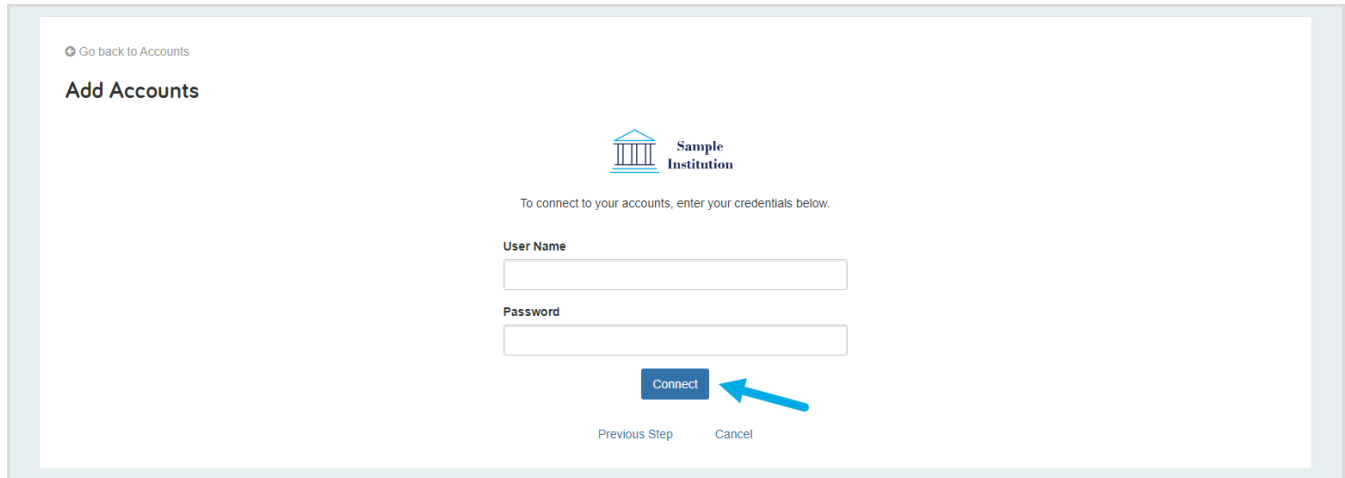
1. [Sample Institution](#)

6. If an Acknowledge Institution Notice screen appears, you should read the notice, and then click **Continue**.

This notice varies by institution and will inform you of any important information related to this institution's connection.


Adding Accounts

7. Enter your login credentials for this institution and click **Connect**.



Go back to Accounts

Add Accounts

 **Sample Institution**

To connect to your accounts, enter your credentials below.

User Name

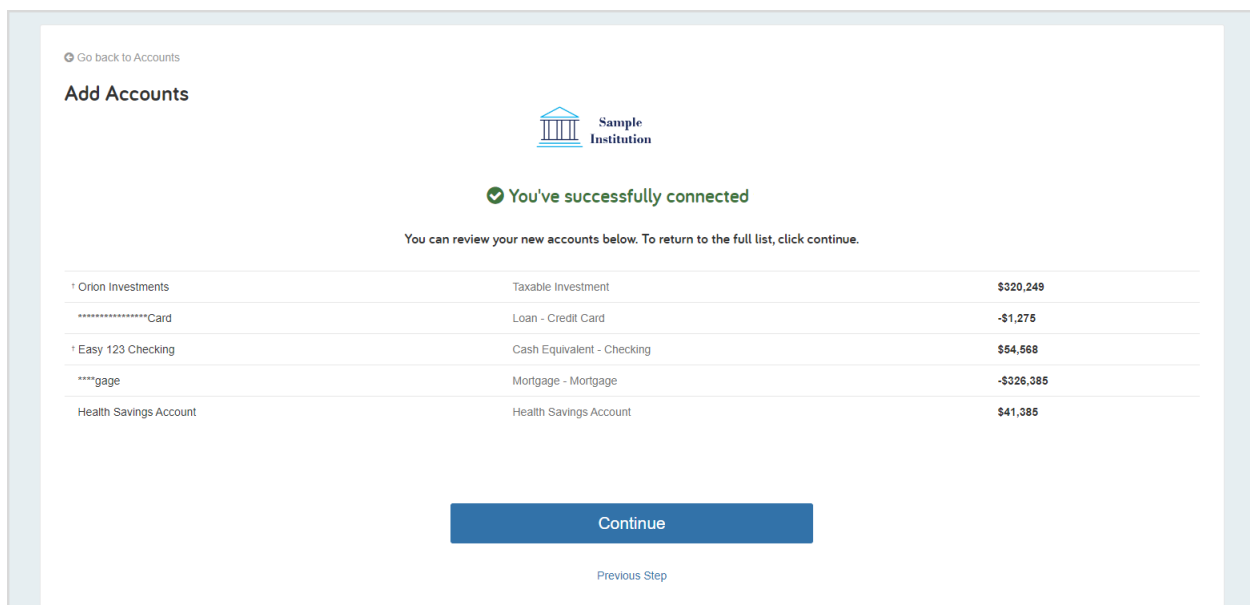
Password

Connect ←

[Previous Step](#) [Cancel](#)


If there is an issue connecting to your accounts, you will receive a status message describing the problem and you can click on the message to learn how to fix it.

8. Once your credentials have been verified you can review the accounts brought over through the connection. Click **Continue** to return to an overview of all accounts you have entered into your portal.



Go back to Accounts

Add Accounts

 **Sample Institution**

✔ You've successfully connected

You can review your new accounts below. To return to the full list, click continue.

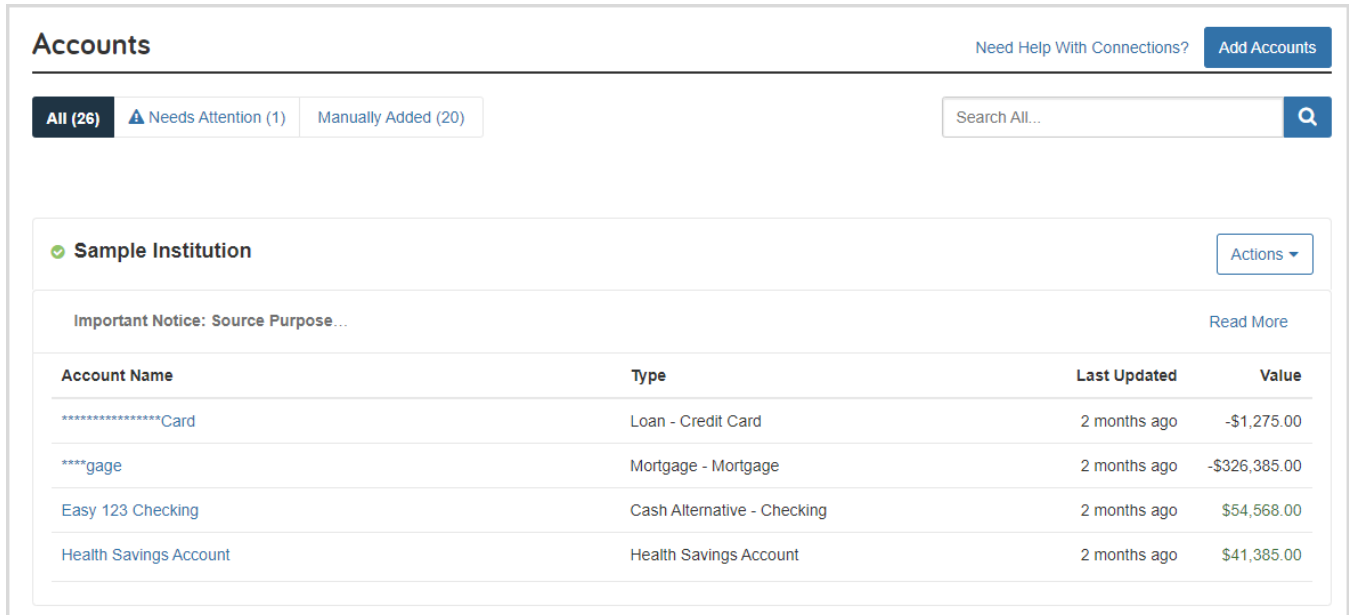
1 Orion Investments	Taxable Investment	\$320,249
*****Card	Loan - Credit Card	-\$1,275
1 Easy 123 Checking	Cash Equivalent - Checking	\$54,568
****gage	Mortgage - Mortgage	-\$326,385
Health Savings Account	Health Savings Account	\$41,385

Continue

[Previous Step](#)

Adding Accounts

9. On the Accounts page you can easily see when your accounts with an institution last updated or if any accounts are in an error state.



Accounts Need Help With Connections? Add Accounts

All (26) Needs Attention (1) Manually Added (20)

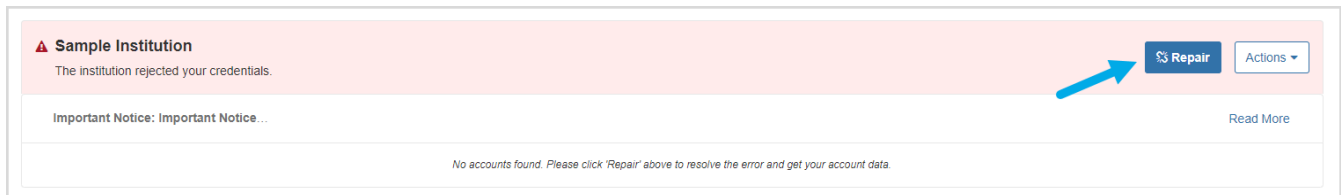
Sample Institution Actions

Important Notice: Source Purpose... Read More

Account Name	Type	Last Updated	Value
*****Card	Loan - Credit Card	2 months ago	-\$1,275.00
****gage	Mortgage - Mortgage	2 months ago	-\$326,385.00
Easy 123 Checking	Cash Alternative - Checking	2 months ago	\$54,568.00
Health Savings Account	Health Savings Account	2 months ago	\$41,385.00

10. Each connection you establish will have its own specific maintenance required. For example, if you updated your password at the institution you will need to then update the credentials on the connection in your portal.

Errors that you can repair will appear with a **Repair** button that you can click to fix the issue.



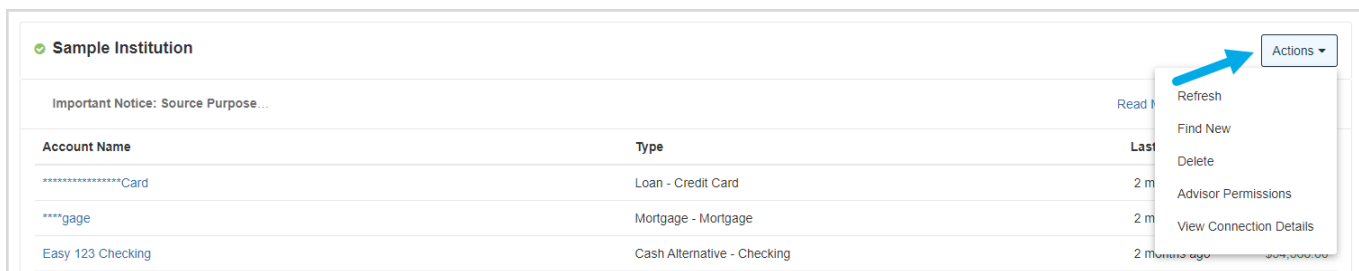
Sample Institution Repair Actions

The institution rejected your credentials.

Important Notice: Important Notice... Read More

No accounts found. Please click 'Repair' above to resolve the error and get your account data.

With the Actions menu, you can **Refresh** the connection to pull over updated account values, **Find New accounts**, **Delete** the connection, access **Advisor Permissions**, or **View Connection Details**.



Sample Institution Actions

Important Notice: Source Purpose... Read More

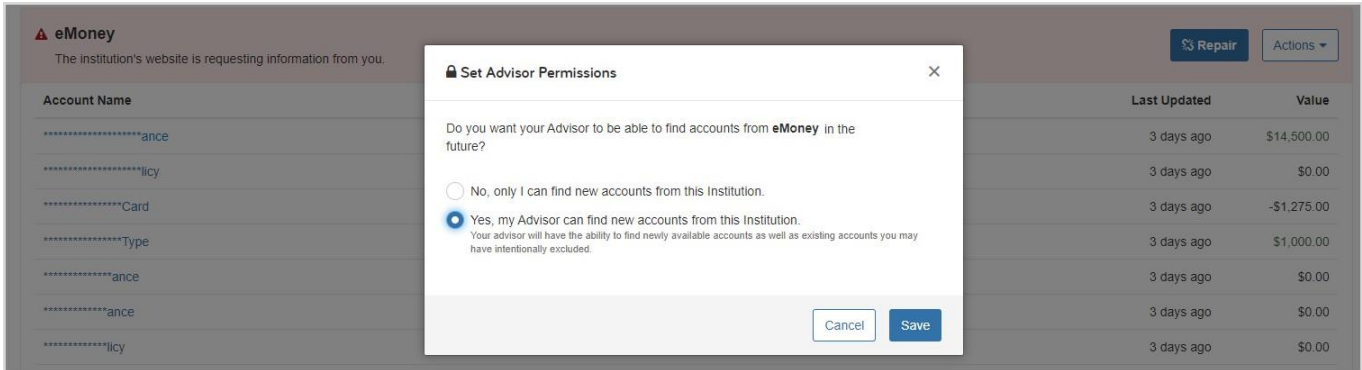
Account Name	Type	Last Updated
*****Card	Loan - Credit Card	2 months ago
****gage	Mortgage - Mortgage	2 months ago
Easy 123 Checking	Cash Alternative - Checking	2 months ago

- Refresh
- Find New
- Delete
- Advisor Permissions
- View Connection Details

Note: If you **Delete** the Connection, you will lose all accounts and transaction history. This is not recommended unless the connection and its accounts are no longer needed.

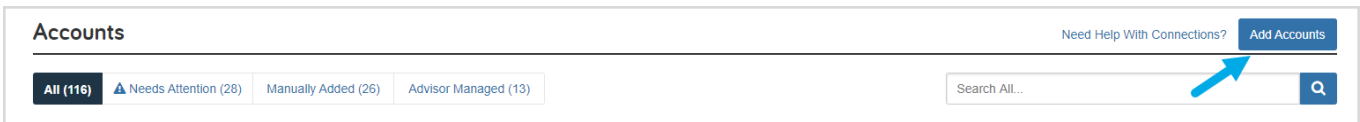
Adding Accounts

The **Advisor Permissions** selection displays a popup that allows you to enable your Advisor to find new accounts on your behalf.

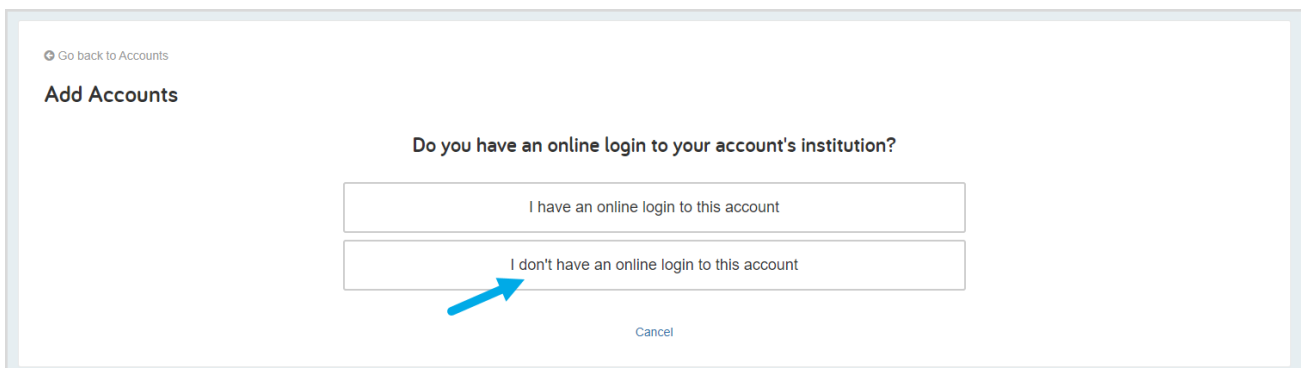


Adding Manual Accounts

1. Click **Add Accounts** on the Accounts page.



2. Click **I don't have an online login to this account.**



Adding Accounts

3. Select the type of account.

[Go back to Accounts](#)

Add Accounts

What type of account is this?

Cash	Investment
Insurance	Liability
Stock Option	Note Receivable

Accounts added from here will not be automatically updated.

[Previous Step](#) [Cancel](#)

4. Then, click the more specific type of account.

[Go back to Accounts](#)

Add Accounts

What type of investment is this?

529 Plan	Health Savings Account	Roth IRA
529 Plan	Health Savings Account	Roth IRA
Annuity	Qualified Retirement	Taxable Investment
Fixed	IRA	Taxable Investment
Variable	Money Purchase	
	Other	
	Pension	
	Profit Sharing	
	Roth 401(k)	
	Roth 403(b)	
	SEP	
	Traditional 401(k)	
	Traditional 403(b)	
Deferred Compensation		
Deferred Compensation		

Accounts added from here will not be automatically updated.

[Previous Step](#) [Cancel](#)

YOUR INTEGRAL WEALTH PORTAL

Adding Accounts

5. Enter details about the account and click **Save**.

[Go back to Accounts](#)

Taxable Investment

Asset Name	<input type="text" value="Taxable Investment"/>
Institution Name	<input type="text" value="Joanna's Investment Account"/>
Owner	<input type="text" value="Other Heirs"/> + Add
Total Value	<input type="text" value="\$33,000"/>
Holdings Value	<input type="text"/>
Cash Balance	<input type="text"/>
Margin Balance	<input type="text"/>
Tax Basis	<input type="text" value="\$27,500"/>