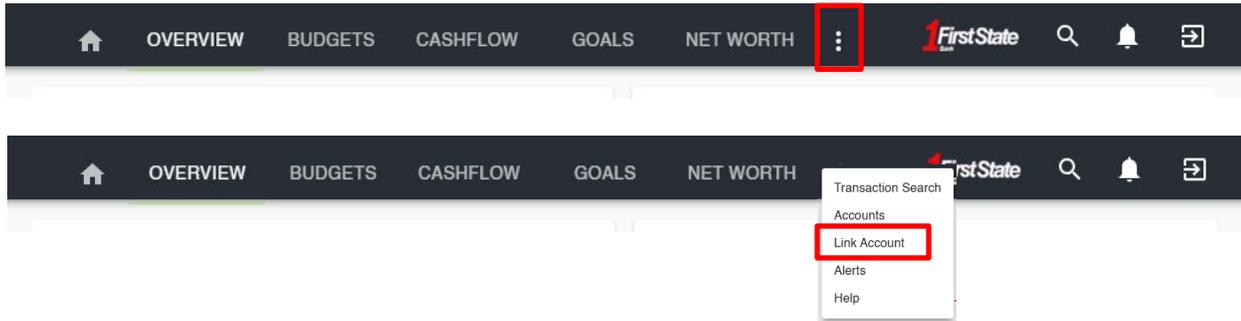


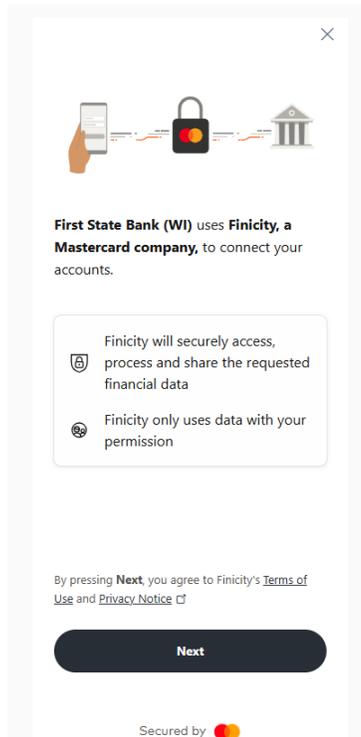
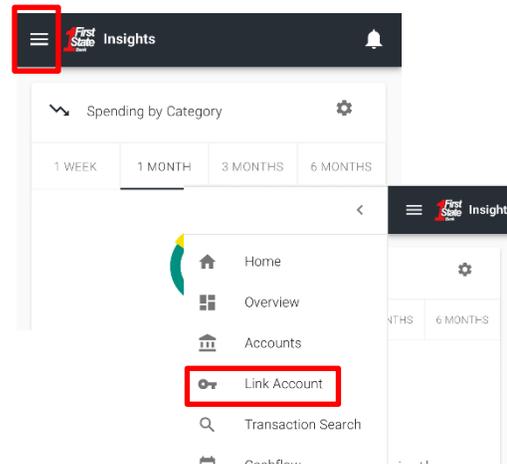


Linking Accounts in Insights

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



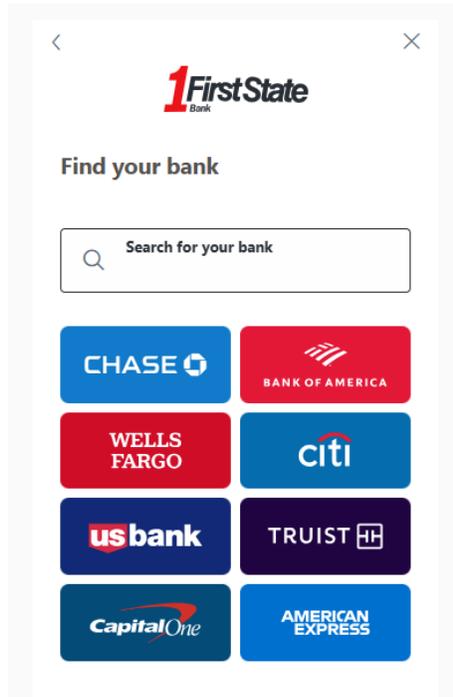
On Mobile: Click on the hamburger (three horizontal lines) in the upper left. Select “Link Account” from the dropdown menu.



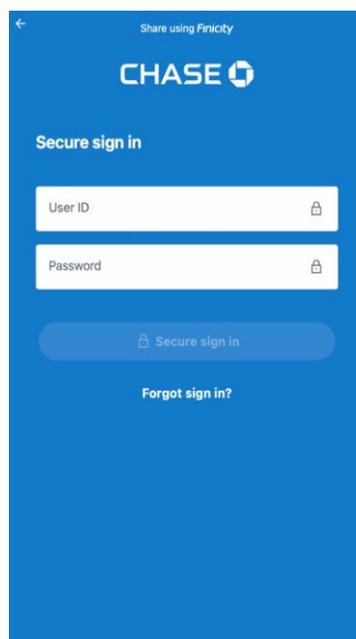
2) Accept the Terms and Conditions before continuing by pressing “Next”.



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

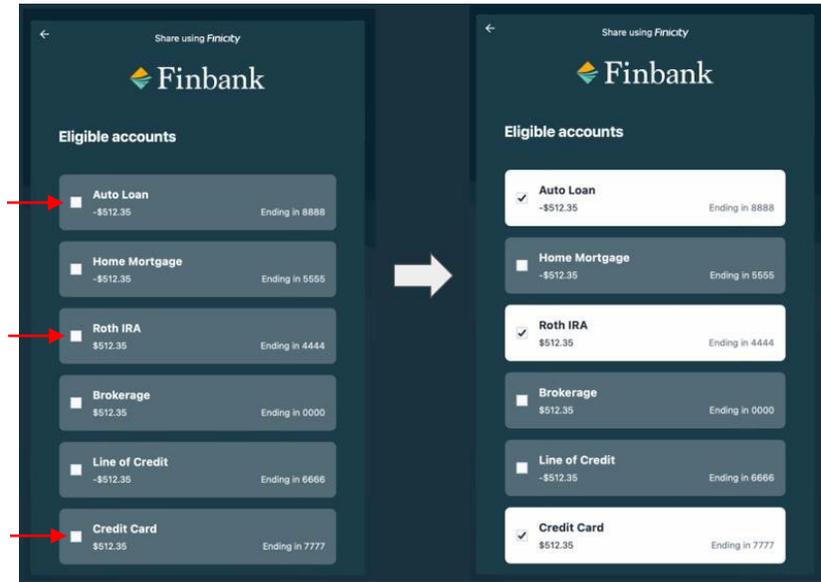


- 4) After agreeing to the terms and conditions, the user will be brought to a login screen hosted by the financial institution that the user is attempting to aggregate accounts from.





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.



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".

