

Adding new accounts. Want to keep all your accounts organized and in one place? Click the Add button above the Accounts list to search for your checking, savings, credit cards, loans, and brokerage accounts. If you're having trouble finding an institution, check out the search tips in the Frequently Asked Questions section. Once you have clicked on your financial institution, enter your login information and click Connect. You may be prompted to answer a security question. Finally, you can rename and classify your account. For this one, let's leave it as it appears. Now you're all finished. It is that easy. Simply repeat the process for more accounts. Keep your financial picture clear with this tool.