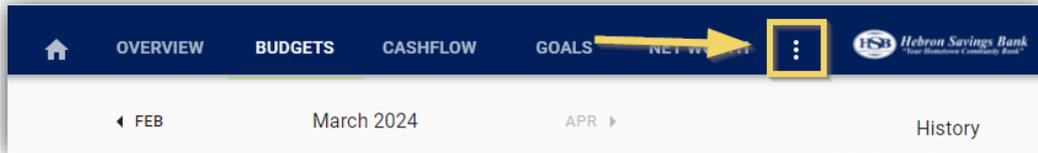


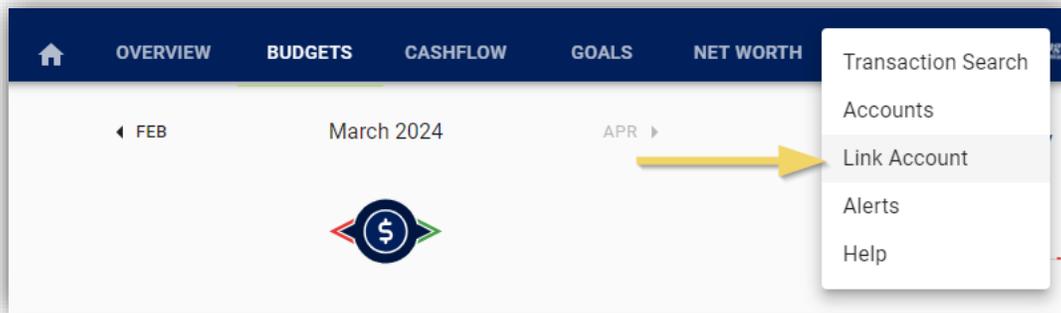
Insights - Linking Accounts from Other Banks

To get an overall picture of all of your spending you will want to link any existing accounts you may have. This may include credit cards, mortgage accounts, auto loans or just a savings account at another bank.

At the top of the screen, click the three little dots.

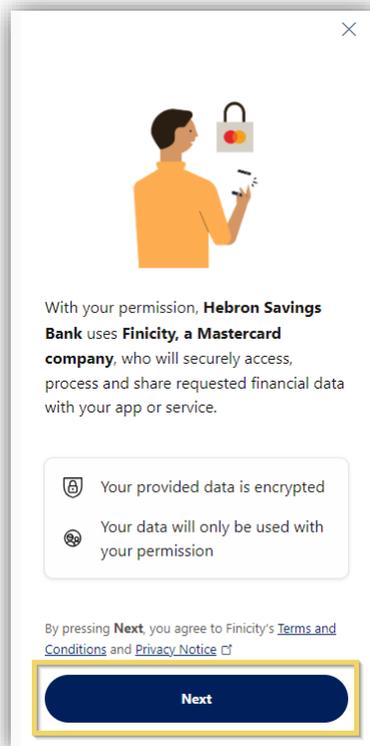


Click Link Account.

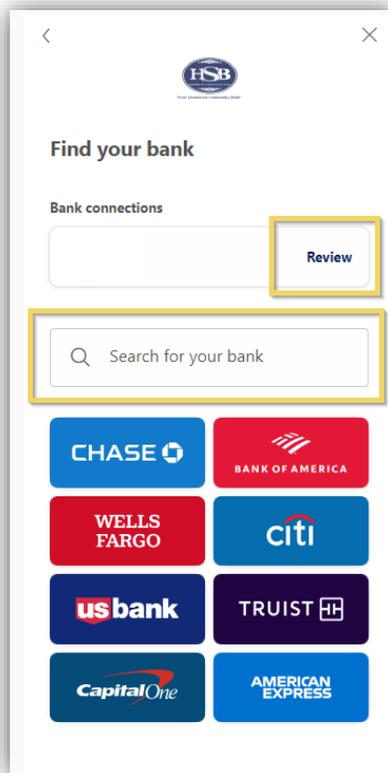


Read the disclosure on the pop up and verify you are okay with the data that is being accessed securely.

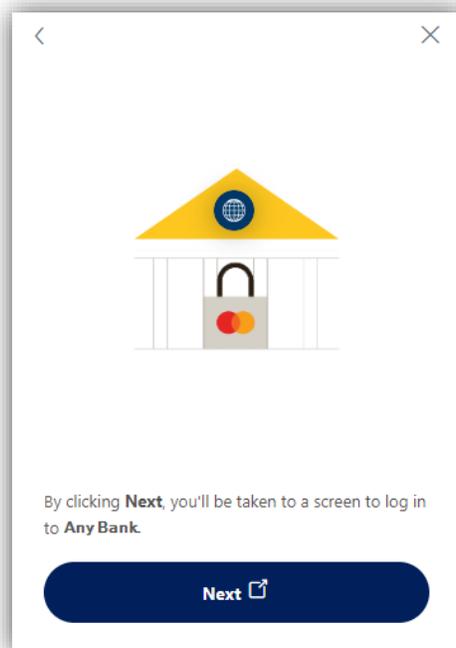
Click next.



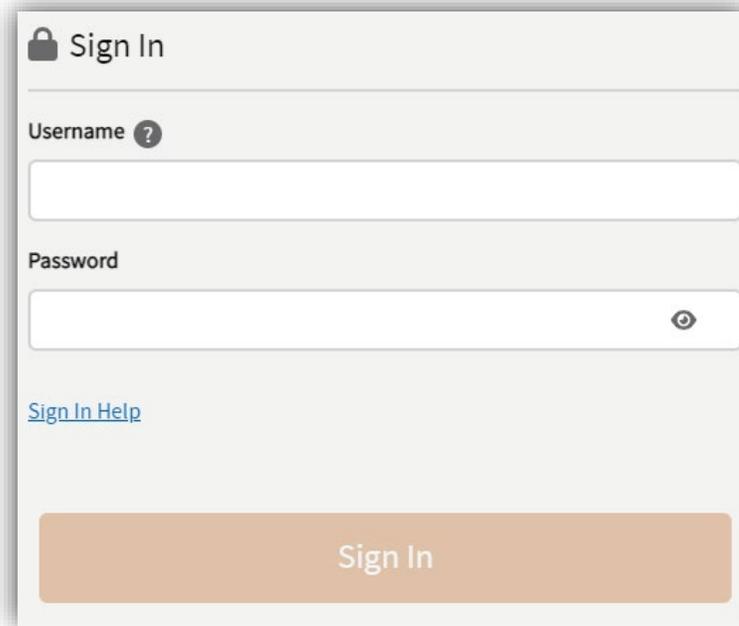
On the next screen you will be able to search for your bank. (You can also review any existing connections once they exist.)



Click on your selected bank. The screen will have you verify you are going to use that bank's credentials to log into the next screen.



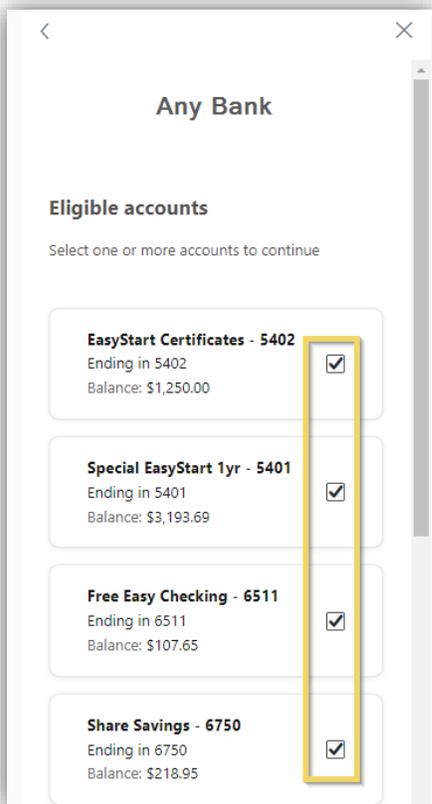
Enter your credentials into the next sign in.



A sign-in form with a lock icon and the text "Sign In" at the top. Below it are two input fields: "Username" with a question mark icon and "Password" with an eye icon. A blue link "Sign In Help" is positioned below the password field. At the bottom is a large orange button labeled "Sign In".

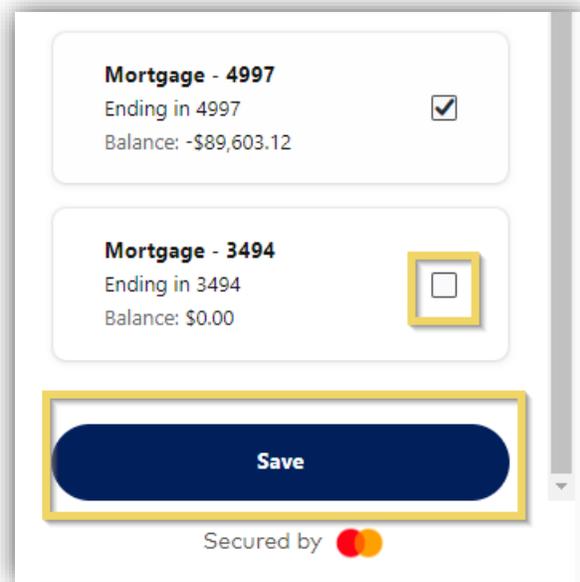
Select which accounts you wish to see. Checking the box includes the accounts. Leaving it blank will exclude the account.

Click Save.



A screen titled "Any Bank" with a back arrow and a close button. Under "Eligible accounts", it says "Select one or more accounts to continue". There are four account options, each with a checked checkbox:

- EasyStart Certificates - 5402**
Ending in 5402
Balance: \$1,250.00
- Special EasyStart 1yr - 5401**
Ending in 5401
Balance: \$3,193.69
- Free Easy Checking - 6511**
Ending in 6511
Balance: \$107.65
- Share Savings - 6750**
Ending in 6750
Balance: \$218.95



A screen showing two mortgage accounts with checkboxes:

- Mortgage - 4997**
Ending in 4997
Balance: -\$89,603.12
- Mortgage - 3494**
Ending in 3494
Balance: \$0.00

At the bottom is a large blue button labeled "Save". Below the button, it says "Secured by" followed by the Mastercard logo.

You should now see your internal and external accounts.

Repeat the previous steps to add additional banks.

The screenshot displays a financial dashboard with a dark blue header. The header contains navigation tabs: OVERVIEW, BUDGETS, CASHFLOW, GOALS, and NET WORTH. On the right side of the header, there is a logo for Hebron Savings Bank, a search icon, and a refresh icon. Below the header, there are two tabs: ACTIVE and INACTIVE. The ACTIVE tab is selected and underlined. The main content area shows a list of accounts with their names, bank names, and balances. A vertical scrollbar is on the right side of the list. At the bottom right of the list, there is a blue circular button with a white plus sign.

Account Name	Bank	Balance
Cash		\$6,640.45
Joint	Any Bank	\$1,000.00
Spending Account	Any Bank	\$456.71
READY CK 0001	Any Bank	\$4,857.14
Free Easy Checking - 6511	Any Bank	\$107.65
Share Savings - 6750	Any Bank	\$218.95
Credit Cards		\$0.00
Visa Platinum - 8623	Any Bank	\$0.00
Debts		\$124,096.87
Home Equity Line - 9333	Any Bank	\$34,493.75