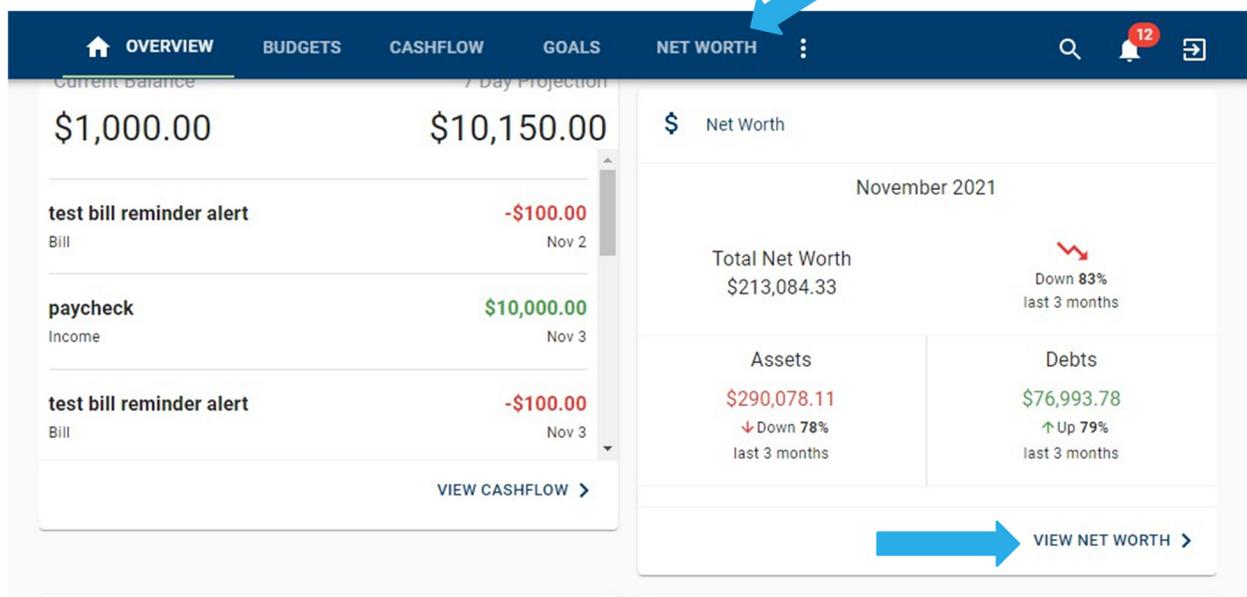


# Insights

## How to Add External Accounts, Assets or Liabilities to Net Worth

Step 1: Navigate to *Insights* and select the *Net Worth* button on your dashboard; or choose the Net Worth tab in the toolbar.



# Insights

Step 2: Click *Add Asset* or *Add Liability*.



The More You Know: The Net Worth tab allows you to track investments, wealth, and debt all in one place; while having access to monthly, quarterly, and annual trends. Your financial future is just as important as their day to day.

# Insights

Step 3: Use the *Link Account* button to link an account held at an external financial institution.

← **OVERVIEW** BUDGETS CASHFLOW GOALS NET WORTH 🔍 🏠

Total Assets	\$281,578.11	
401(k) Fidelity Investment	\$89,078.11 >	Linked Asset
Checking Personal CashEdge Test Bank (Agg) - Retail 2FA	\$328.90 >	Is this asset an account at a Bank or Credit Union? Link your account to easily keep these details updated.
One bank	\$10,000.00 >	<b>LINK ACCOUNT</b> ←
Wells Fargo2	\$1,000.00 >	Unlinked Asset
Investment	\$20,000.00 >	Name *
Trust Fund	\$10,000.00 >	Amount *
foreign asset	\$50,000.00 >	\$
Gold Collection	\$100,000.00 >	
Wine Collection	\$1,500.00 >	
Excluded Assets		
Primary Savings Savings	\$1,000.00 >	

CANCEL SAVE

# Insights

Step 4: Click on, or search for, the financial institution your external asset or liability is held at.

OVERVIEW BUDGETS CASHFLOW GOALS NET WORTH

Add an account

Choose from the following financial institutions or search by name below.

Don't see your financial institution above? Search for it here.

Name \_\_\_\_\_

SEARCH

Still can't find what you're looking for?

[CONTACT SUPPORT FOR ASSISTANCE](#)

# Insights

Step 5: If the asset/liability is not a linkable account, you can add the information manually using the *Name* and *Amount* fields.

The screenshot shows a financial dashboard with a dark blue navigation bar at the top containing icons for back, home, and menu, and tabs for OVERVIEW, BUDGETS, CASHFLOW, GOALS, and NET WORTH. Below the navigation bar, a table lists various assets with their names, amounts, and status. A modal form on the right side of the screen is used for manually adding an unlinked asset. The form includes a 'Name\*' field with the text 'Vintage Wine Collection' and an 'Amount\*' field with the value '\$ 15,000.00'. A blue arrow points to the 'Name\*' field. At the bottom of the form are 'CANCEL' and 'SAVE' buttons.

Asset Name	Amount	Status
Total Assets	\$281,578.11	
401(k) Fidelity Investment	\$89,078.11	Linked Asset
Checking Personal CashEdge Test Bank (Agg) - Retail 2FA	\$328.90	Is this asset an account at a Bank or Credit Union? Link your account to easily keep these details updated.
One bank	\$10,000.00	<a href="#">LINK ACCOUNT</a>
Wells Fargo2	\$1,000.00	Unlinked Asset
Investment	\$20,000.00	Name* Vintage Wine Collection
Trust Fund	\$10,000.00	Amount* \$ 15,000.00
foreign asset	\$50,000.00	<a href="#">CANCEL</a> <a href="#">SAVE</a>
Gold Collection	\$100,000.00	
Wine Collection	\$1,500.00	
Excluded Assets		
Primary Savings Savings	\$1,000.00	

Step 6: Click Save.