

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

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

The screenshot displays the Geezeo dashboard interface. The top navigation bar includes tabs for OVERVIEW, BUDGETS, CASHFLOW, GOALS, and NET WORTH. A blue arrow points to the NET WORTH tab. The main content area is divided into two sections. The left section shows a 'Current Balance' of \$1,000.00 and a '7 Day Projection' of \$10,150.00. Below this, there are three transaction entries: 'test bill reminder alert' (Bill, -\$100.00, Nov 2), 'paycheck' (Income, \$10,000.00, Nov 3), and another 'test bill reminder alert' (Bill, -\$100.00, Nov 3). A 'VIEW CASHFLOW >' button is located at the bottom of this section. The right section is titled '\$ Net Worth' and shows data for November 2021. It includes 'Total Net Worth' of \$213,084.33, which is 'Down 83%' last 3 months. Below this, there are two sub-sections: 'Assets' valued at \$290,078.11 (Down 78% last 3 months) and 'Debts' valued at \$76,993.78 (Up 79% last 3 months). A blue arrow points to the 'VIEW NET WORTH >' button at the bottom right of this section.

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.

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

The screenshot shows a financial dashboard with a dark blue navigation bar at the top containing the following tabs: OVERVIEW, BUDGETS, CASHFLOW, GOALS, and NET WORTH. A search icon and a refresh icon are also present in the top right. The main content area displays a list of assets with their respective values and a 'LINK ACCOUNT' button highlighted by a blue arrow.

Asset Name	Value	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	Linked Asset
One bank	\$10,000.00	Linked Asset
Wells Fargo2	\$1,000.00	Unlinked Asset
Investment	\$20,000.00	Unlinked Asset
Trust Fund	\$10,000.00	Unlinked Asset
foreign asset	\$50,000.00	Unlinked Asset
Gold Collection	\$100,000.00	Unlinked Asset
Wine Collection	\$1,500.00	Unlinked Asset
Excluded Assets		
Primary Savings Savings	\$1,000.00	Unlinked Asset

Is this asset an account at a Bank or Credit Union? Link your account to easily keep these details updated.

LINK ACCOUNT

Name *

Amount *

\$









CANCEL SAVE

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](#)

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 mobile application interface for tracking net worth. At the top, there is a navigation bar with tabs for OVERVIEW, BUDGETS, CASHFLOW, GOALS, and NET WORTH. The NET WORTH tab is selected. Below the navigation bar, the total assets are listed as \$281,578.11. A list of assets follows, including a 401(k) Fidelity Investment (\$89,078.11), a Checking Personal account at CashEdge Test Bank (\$328.90), and several other bank and investment accounts. A 'LINK ACCOUNT' button is visible next to the 'One bank' entry. Below the list, there is a section for 'Unlinked Asset' with a form to add a new asset. The form includes a 'Name *' field with the text 'Vintage Wine Collection' and an 'Amount *' field with the text '\$ 15,000.00'. A blue arrow points to the 'Name *' field. At the bottom of the form are 'CANCEL' and 'SAVE' buttons.

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Total Assets	\$281,578.11	
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Gold Collection	\$100,000.00	Unlinked Asset
Wine Collection	\$1,500.00	Unlinked Asset
Excluded Assets		
Primary Savings Savings	\$1,000.00	Unlinked Asset

Manual Entry Form:

Name *
Vintage Wine Collection

Amount *
\$ 15,000.00

CANCEL SAVE

Step 6: Click Save.

