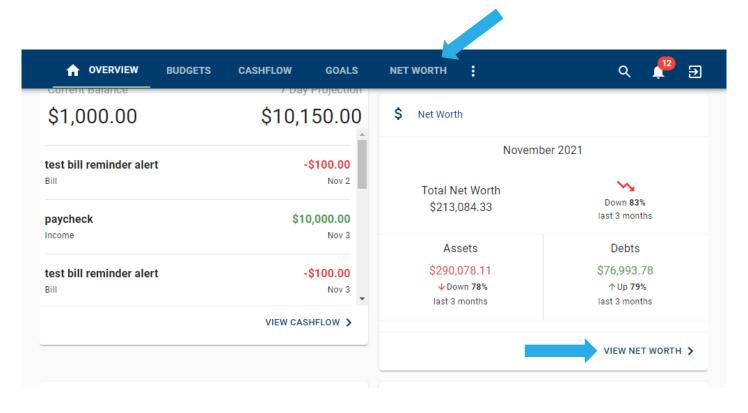


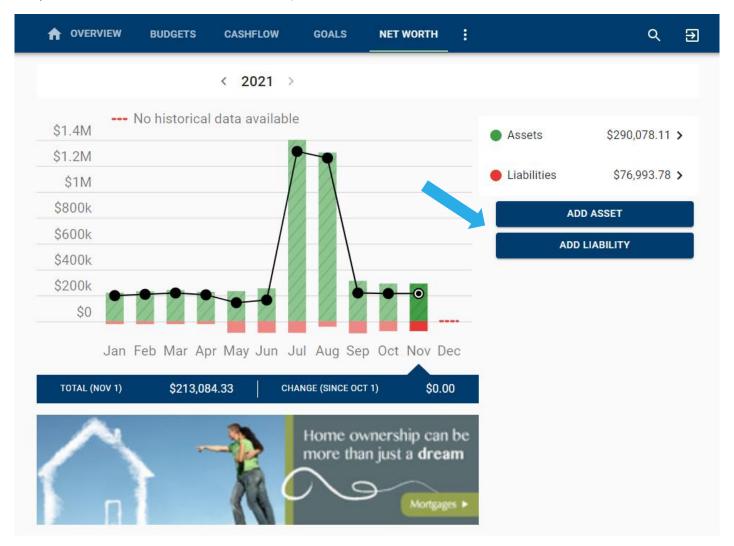
Personal Financial Management

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.

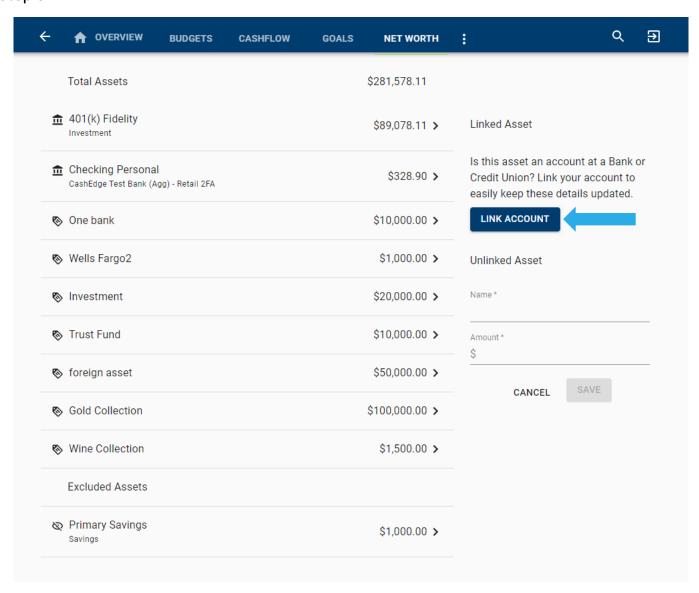


Step 2: Click Add Asset or Add Liability.

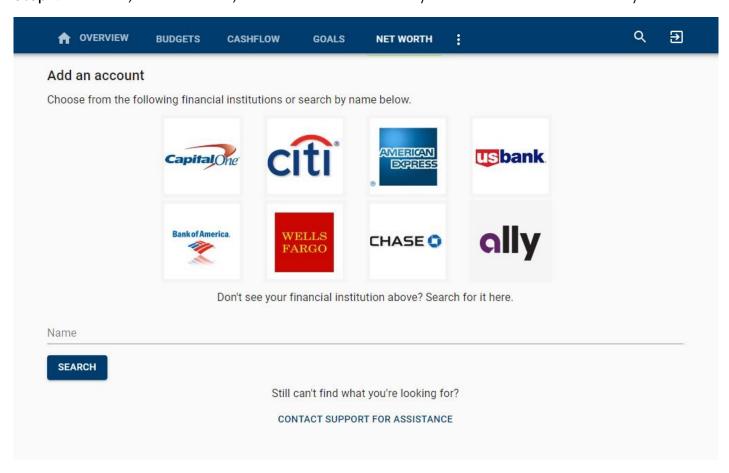


The More You Know: The Net Worth tab allows you to track investments, wealth, and debt all in one place; while having access to monthly, quarterly, and annual trends. Your financial future is just as important as their day to day.

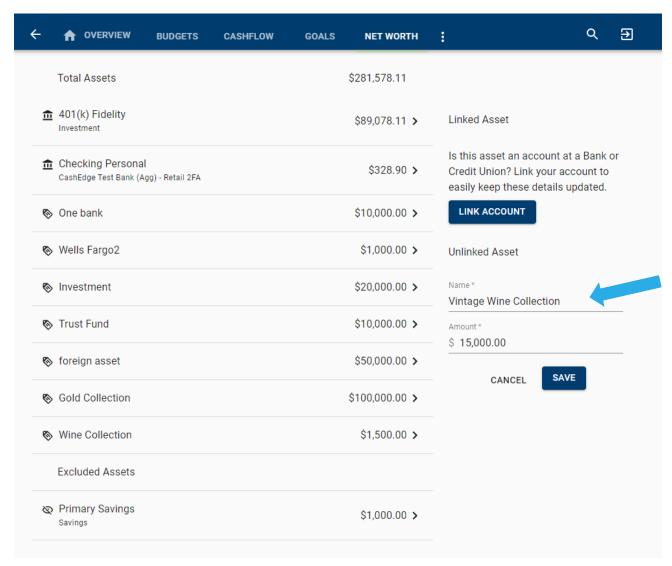
Step 3: Use the Link Account button to link an account held at an external financial institution.



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



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



Step 6: Click Save.