

Select the three dots to the right of Net Worth and then select Link Account from the drop down.



Select one of the eight default financial institutions listed or use the search bar





Accept the Terms and Conditions before continuing by pressing Next

	St :::::: Finicity :::::::
	We use Finicity to gather data from Chase.
Sec	urity and privacy
R	Sign-in information is not shared
	Your data will only be used with your permission
۵	We protect you by encrypting your data

After agreeing to the terms and conditions, the user will be brought to a login screen hosted by the financial institution that the user is attempting to aggregate accounts from.

÷	Share using Finicity	
	CHASE 🖨	
	Secure sign in	
	User ID	₿
	Password	₿
	Forgot sign in?	

For more information about Jack Henry, visit **jackhenry.com**.



Once the user is able to access their financial institution, they will select which accounts they would like to aggregate by clicking each box next to each account they want to aggregate.

← share using Finicity	nk			Share using Fir 🔶 Finb	ank
Eligible accounts			Eligi	ble accounts	
Auto Loan -\$\$12.36	Ending in 8888		×	Auto Loan -\$512.35	Ending in 8888
Home Mortgage -8512.35	Ending in 5555	\Rightarrow		Home Mortgage -\$512.35	Ending in 5555
Roth IRA \$512.35	Ending in 4444		×	Roth IRA \$512.35	Ending in 4444
Brokerage	Ending in 0000			Brokerage \$512.35	Ending in 0000
Line of Credit -1512.35	Ending in 6666			Line of Credit -\$512.35	Ending in 6666
Credit Card \$512.35	Ending in 7777		×	Credit Card \$512.35	Ending in 7777

After selecting the accounts they would like to aggregate, they will be able to review the accounts they selected and complete the process by clicking Submit.

Review your accounts	
Add all accounts before sharing.	
Add another bank	
FinBank 3 accounts selected	>
Connected	
Submit	

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