invst™
MAKING MONEY WORK FOR PEOPLE

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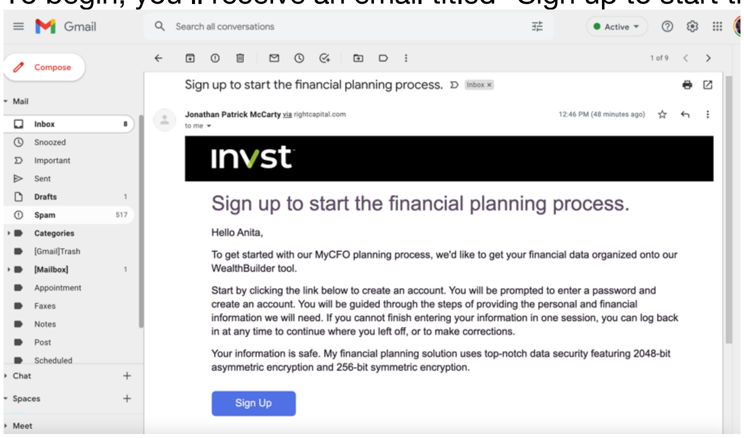
INVST WEALTHBUILDER® CONNECTION SETUP

To begin, you'll receive an email titled "Sign up to start the financial planning process".



Check your spam folder if you don't see it! Click through the link to create your account and password.

The instructions in this document will help you connect your financial accounts, build information into your Organizer, and upload your financial documents to your vault.

For additional help, see the how-to video here.

Link Accounts

Accounts to connect:

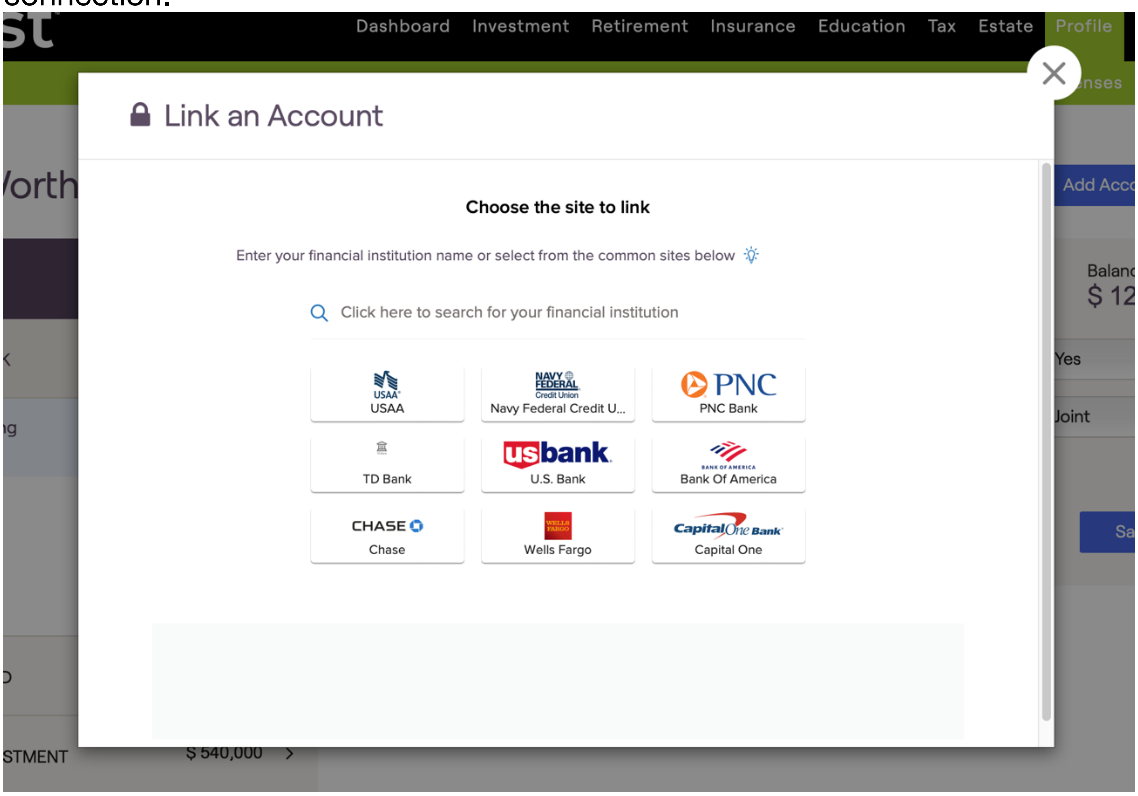
- Bank (checking/savings/etc)
- Investment
- Retirement
- College (529, Coverdell, ESA)
- Debt (mortgage, student, credit cards, auto, etc)

** Invst will not have access to any login information, password, or account/routing numbers for any account you link. The system does not store this data.

1) Click on **"Profile"**

2) Click on **"Link Account"**

3) Type in the financial institution's name or website address, then select the correct institution from the list and follow the instructions to establish the connection.



4) Rinse & repeat for each financial institution that you access online.