

How to Link Accounts to Your eMoney Portal

Linking your accounts gives you and our team a more complete, real-time view of your financial life.

1

Go to Accounts

Accounts

View All

+ Add Account

Cash

\$23,592

▼

Credit Cards

-\$4,733

▲

From your dashboard, click **+ Add Account** under the **Accounts** section.

2

Search for Your Institution

Add Accounts

×

Search for your Institution below by entering its name or website URL.

Search Institutions

Q Search

Add Manual Account

Cancel

Type the name of your financial institution in the search box and click **Search**.

3

Select Your Institution

Add Accounts

×

Search for your Institution below by entering its name or website URL.

chase

Q Search

7 Results

☐ CASE Credit Union

☒ Chase

☐ Chase Insurance Service Center – Variable Annuity

☐ Chasewood Bank

Add Manual Account

Cancel

Choose your institution from the list of results. Then **click the institution name** to select it.

4

Click Connect

Add Accounts

×

CHASE

chase.com

eMoney Advisor will securely link your account.

Security

Your data is encrypted end to end

Protection

We don't see or share your credentials

Privacy

Your data is never sold

Add Manual Account

Back to search

Continue

Review the security information and click **Continue** to proceed.

5

Sign In Securely

CHASE

Chase won't share your username or password.

Username

Password

Show

☐ Use token

Sign in

Or

Passwordless sign in

Forgot username/password >

Not enrolled? Sign up now. >

You will be redirected to your institution's secure login page. Enter your credentials to complete the connection.

Good to Know: You are not required to link accounts, but it does give you and our team a more complete and up-to-date view of your financial life. You can link as many or as few accounts as you'd like.

If you have any questions or need help, we're here for you. Just reach out!