


Linking External Accounts

Members can link external accounts they have at other financial institutions in order to view balances and transaction history. This also allows the members to view these accounts in the financial wellness tool for a more well-rounded view of their finances.

These accounts can be added directly from the Dashboard or from the account settings tab.


LinkExternalAccounts



Get Started


Settings 📄 📁 🔍 Help

Profile Security Themes Widgets Contact Notifications **Accounts** Applications


 [Link an External Account](#)

Add an external account ✕

Select the type of external account you would like to add.

 **Link accounts from another financial institution.** >

You can view the balances and transactions of your accounts at other financial institutions.

 **External transfer account.** >

You can make transfers to and from this account.

Cancel


Click *Get Started* to begin entering the other financial institution's information and online banking credentials

Link Accounts


See all your financial accounts in one secure place.

Time is precious and so is your money. When you link your accounts you will have a safe, secure, and efficient way to view your personal finances. You can link investments, bank accounts, credit cards, and bills.


In three simple steps, see what you owe and how much you have to help you track your investments, spending patterns, and more.



1. Select a financial institution.




2. Enter your site credentials.



3. View your account details.

How we protect your information

By providing your credentials, we verify in real time that you own the account you want to link. When you enter your login username and passwords, we use this information to establish a secure connection with your financial institution. This connection allows us to immediately link to the account you want to see. We use the latest encryption and security technology so no one has access to your personal information or funds.



CANCEL

GET STARTED


Search for the other Financial Institution or select from the most popular sites

Link Accounts

1. SELECT


2. VERIFY

3. VIEW




Institution name

MOST POPULAR SITES




Bank of America

<https://www.bankofamerica.com/>




Chase

<https://www.chase.com/>




Wells Fargo

<https://www.wellsfargo.com/>




Capital One

<https://www.capitalone.com/>



USAA

<https://www.usaa.com/>



Navy Federal Credit Union

<https://www.navyfederal.org>




Follow the prompts for the financial institution in order to link the account. Some institutions will require multi factor authentication to establish a connection.

1. SELECT

2. VERIFY


3. VIEW


Bank of America
www.bankofamerica.com

Please enter your Bank of America online account credentials.

Online ID

Passcode




[SHOW](#)

Re-enter Passcode

Visit your [financial institution's site](#) to retrieve or create your username and password. This will open a new window.

[SUBMIT >](#)

By providing your credentials, we verify in real time that you own the account you want to link. We then use this information to establish a secure connection with your financial institution.



Once completed the list of accounts associated with that log in will display balances and the transactions will be downloaded. This may take some time to complete and for the accounts to then be visible on the dashboard and accounts widgets.

~Linked accounts are for informational purposes and will not show in the accounts to transfer to/from in the transfers widget. See the *External Transfer Account Set Up* job aide for details on how to set those up.