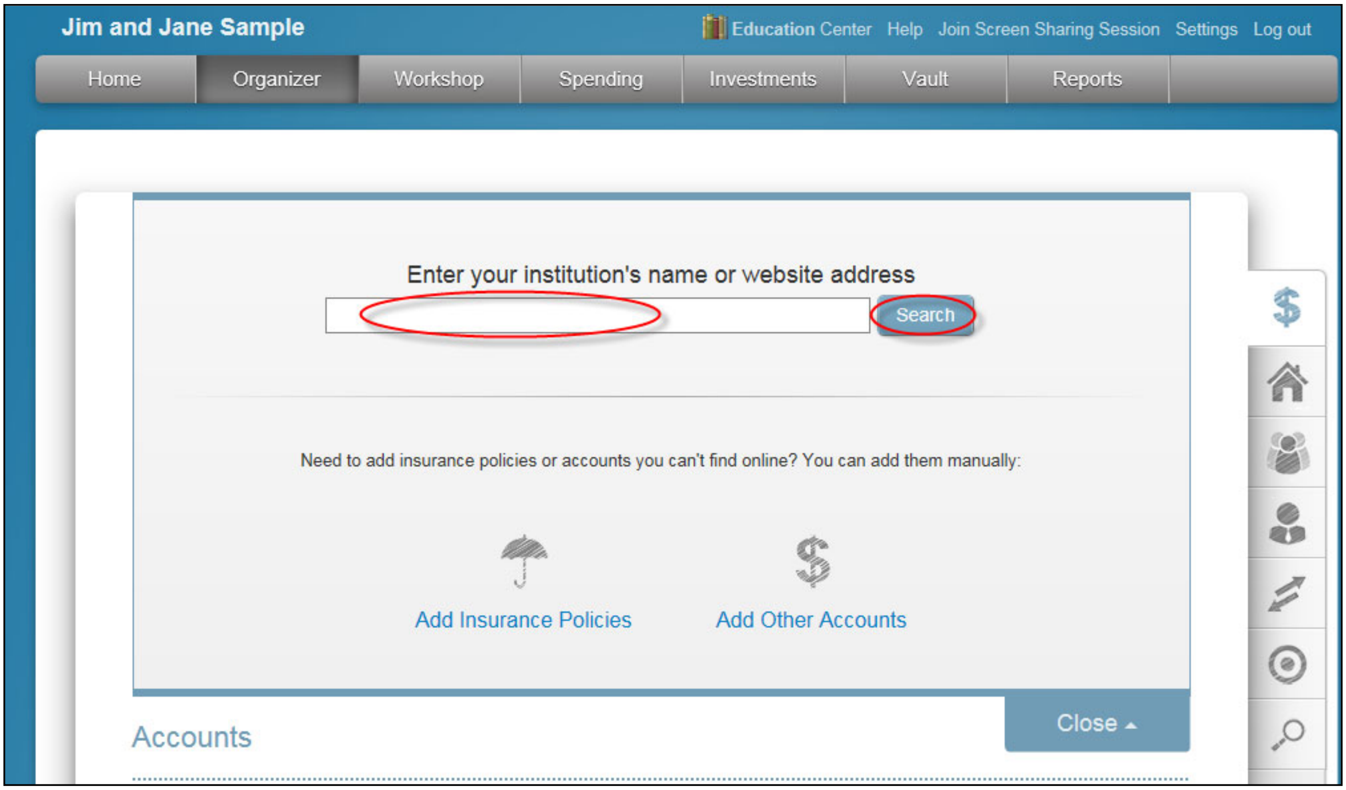
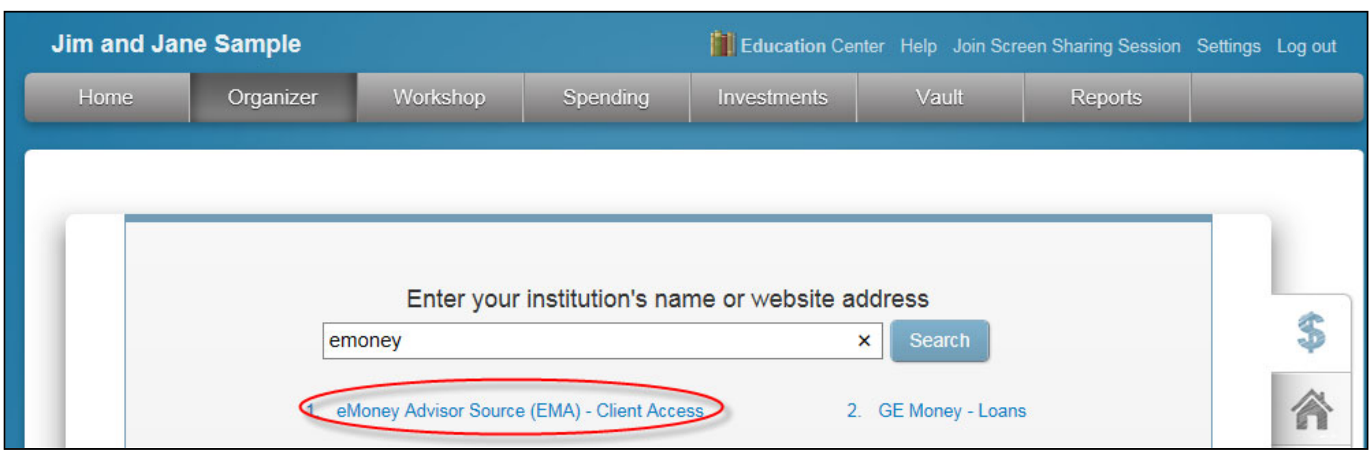
In this user guide we will demonstrate how to set up your Client Connections.

1. Click on **Add** in the Accounts section under the Home page.

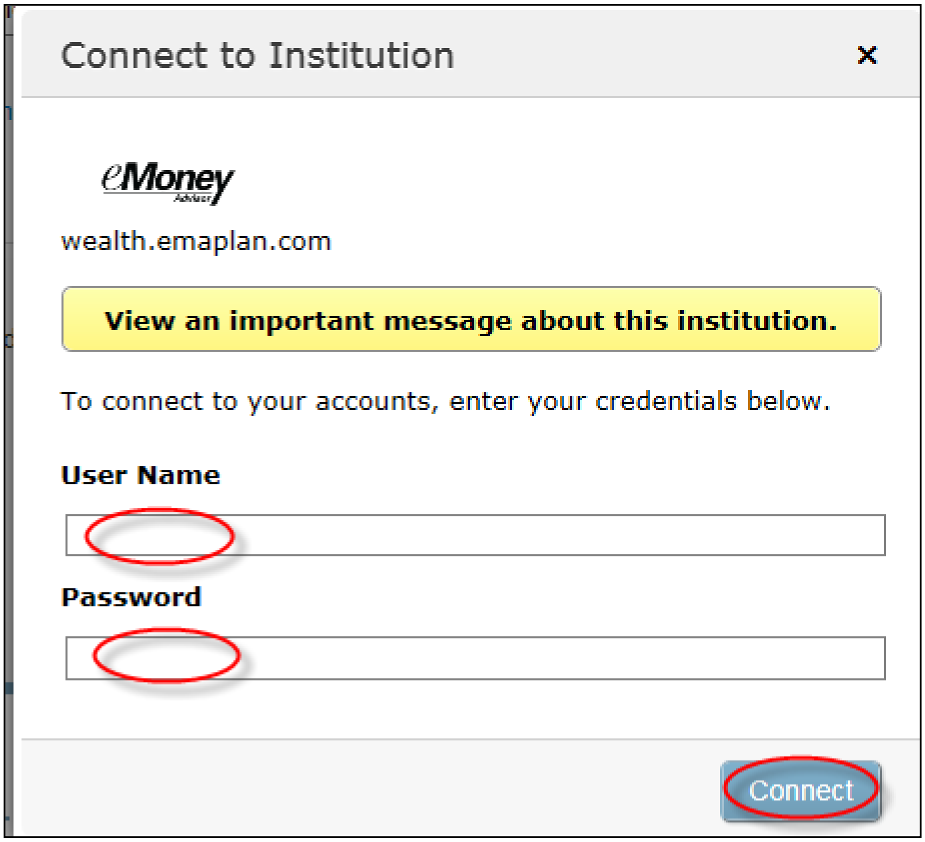
2. Enter the institution name or website address in the search bar and click **Search**.



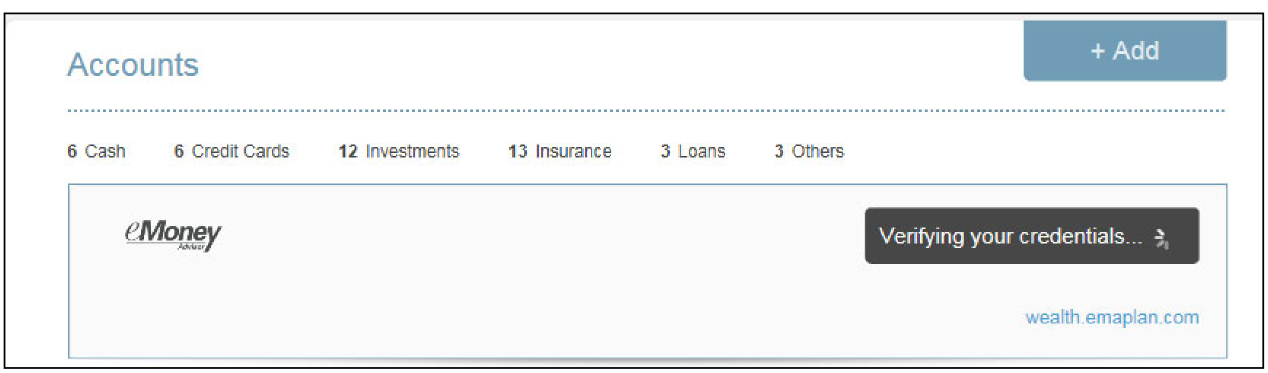
3. From the list of results, select the correct institution.



4. Enter your credentials and click **Connect**.



Please note: The system will take a moment to verify and retrieve your information.



5. The account values are pulled through onto the accounts page.

† Orion Investments	Taxable Investment	02/05/2015 10:44AM	$40,249
† Permanent Life Insurance	Life Insurance - Variable Univers…	02/05/2015 10:44AM	$14,500
Blue Credit Card	Loan - Credit Card	02/05/2015 10:44AM	-$2,368
† Fidelity 401(k)	Qualified Retirement - Traditional…	02/05/2015 10:44AM	$40,249
Stock Options	Stock Option	02/05/2015 10:44AM	$1,239,505

6. To maintain the connection, see options in the upper right corner.