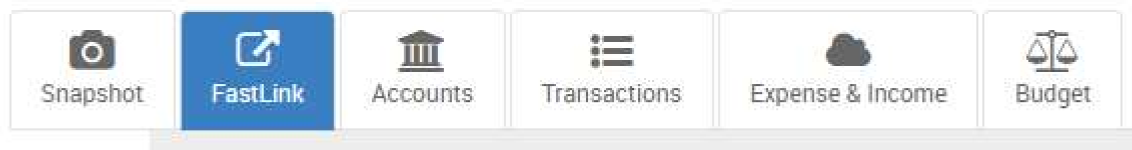
together planning
FINANCIAL PLANNING INVESTMENT MANAGEMENT

Linking Accounts to Your Financial Plan

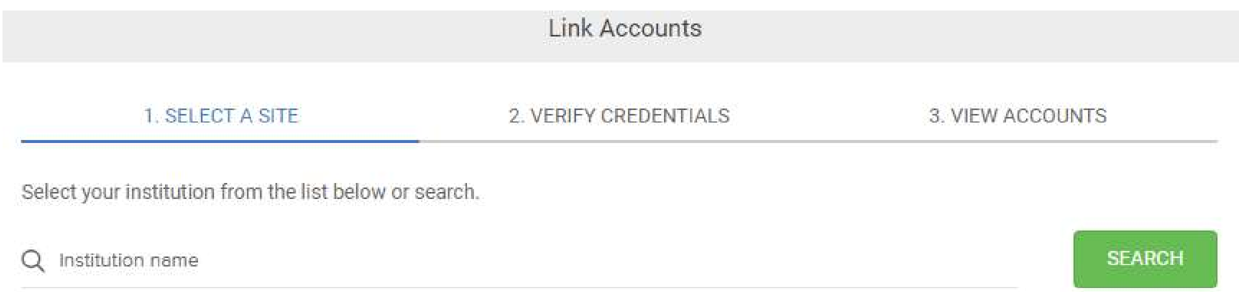
It is easy to link accounts held at other institutions to your Together Planning financial plan. Linking your other accounts allows your financial plan to stay up to date at all times and provides you with an always-current view of your complete financial picture.

Any account that you access online can be linked to your plan. Follow these steps to link your accounts.

1. Login to your financial plan snapshot using the Planning Portal button on our web site. (it was also emailed to you).
2. At the top of your screen, select the box titled “Fast Links” as pictured below:



3. Enter the name of the financial institution in the search bar or select one of the more popular institutions named.



4. Enter your login credentials. Depending on the institution, you may need to also enter your security questions or provide additional information.
5. Repeat for all your financial accounts. You can link bank accounts, student loans, mortgages, credit cards, HSA accounts, your employer retirement plan, insurance policies, and anything else that you access online.

Please call us if you have questions or run into any difficulties!