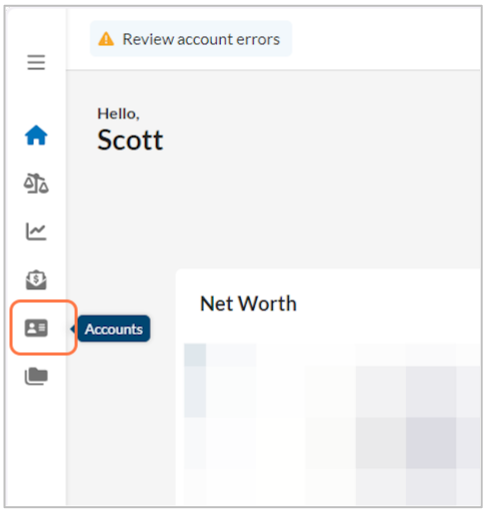
Updated 10/3/2024

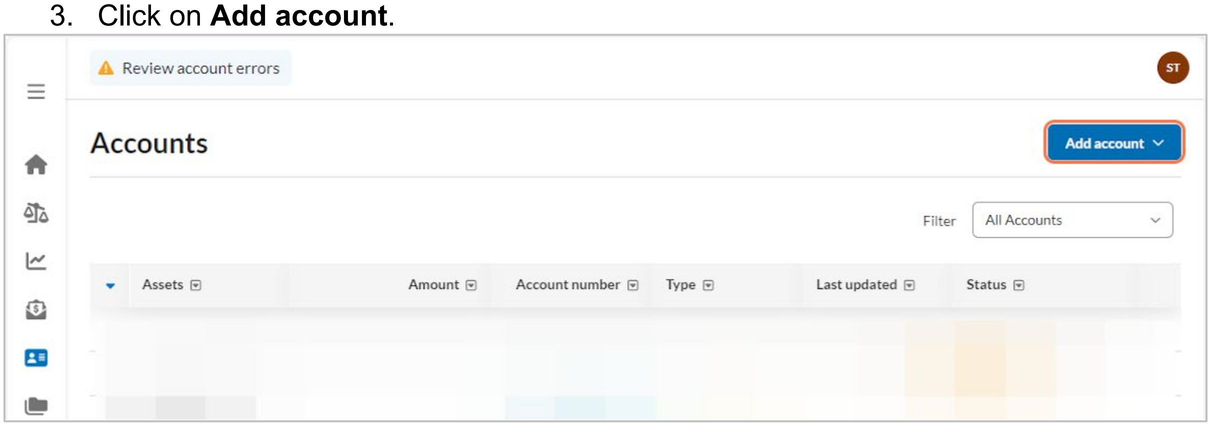
Linking an Account in the Client Portal

You can aggregate accounts in Envestnet's Client Portal to see all your accounts in one place.

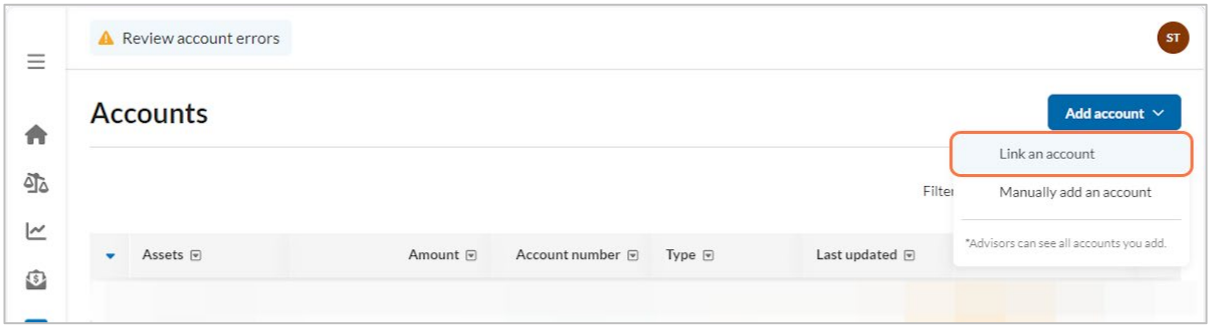
1. Open the Client Portal.
2. Click on the Accounts icon on the left-hand side.



3. Click on **Add account**.



4. Click on **Link an account**.



5. Click on the Financial Institution your account is in or Search if you don't see it.
6. You will then log in to your financial institution then select the accounts you would like to aggregate.