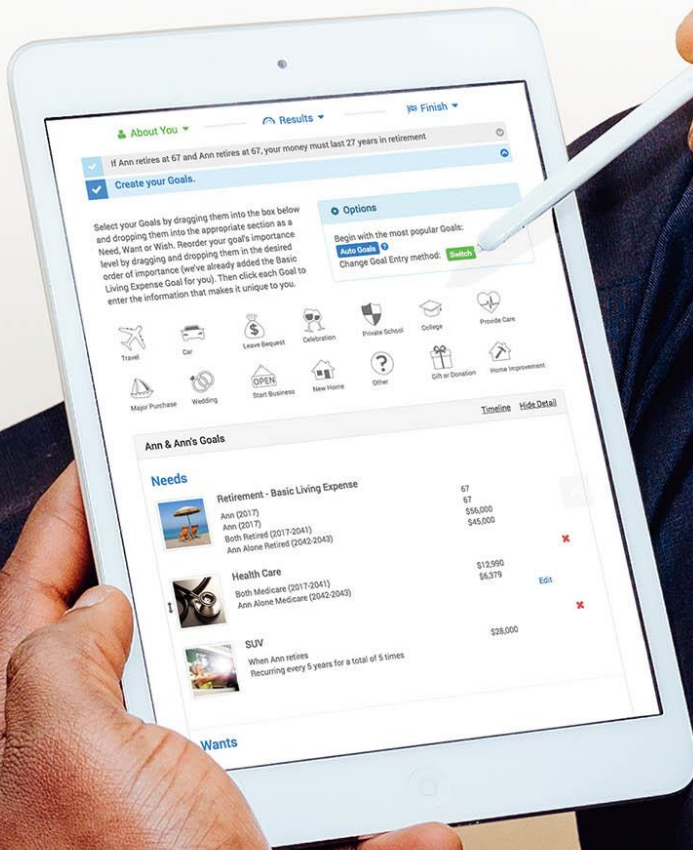




# Valdez

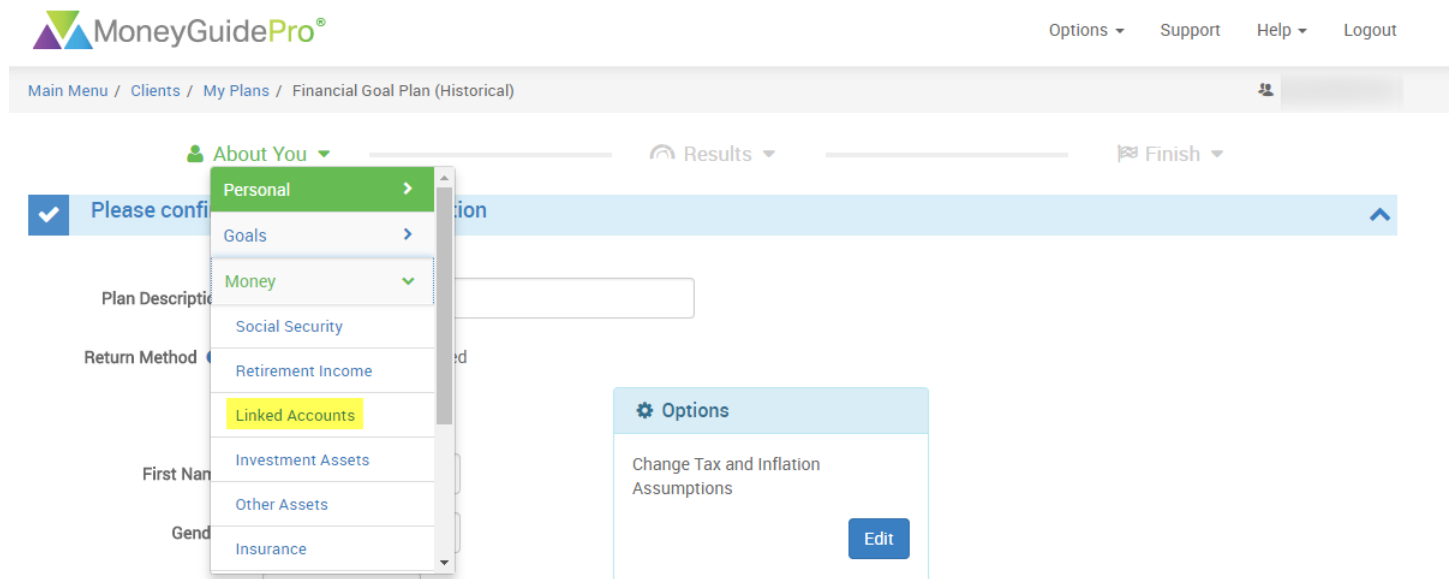
Financial  
Group, LLC



## MX: Adding Accounts

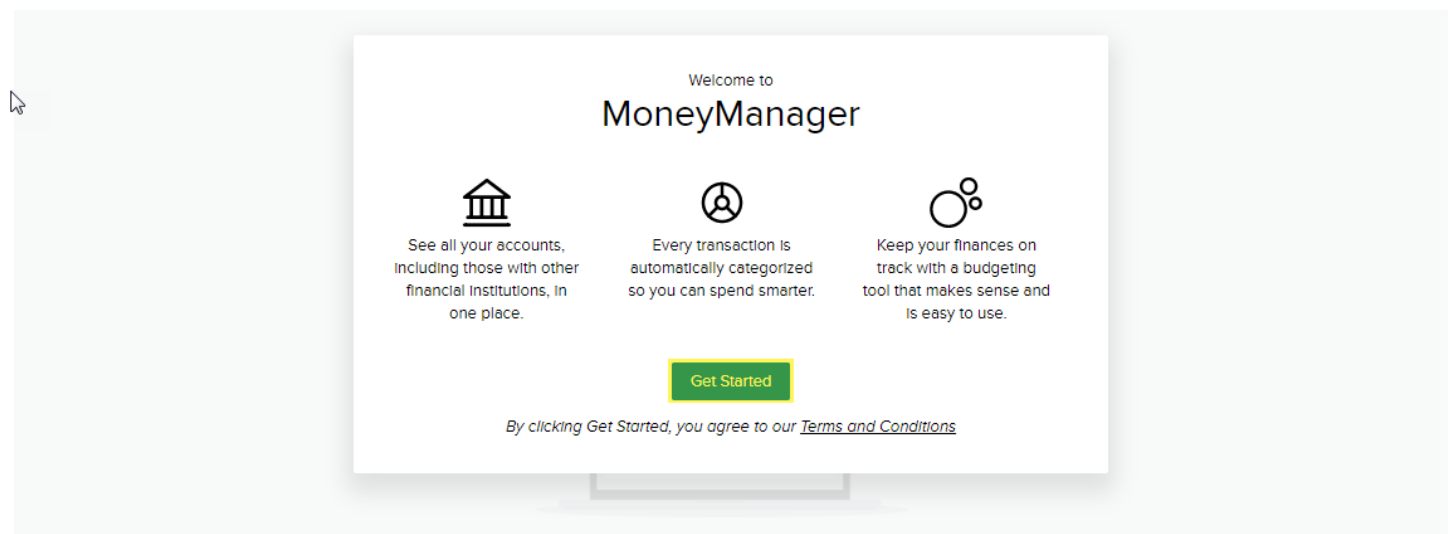
## Step 1:

Within the Financial Goal Plan, click **About You > Money > Linked Accounts**. If you cannot see the **Linked Accounts** page, you may need to click **Next** until you get to that section.



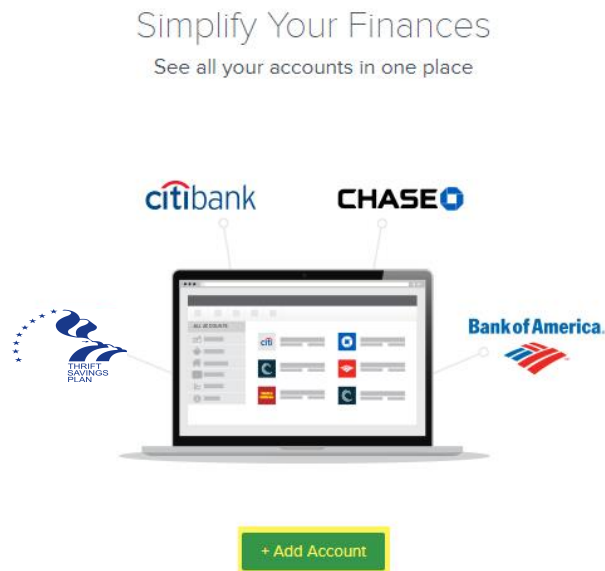
## Step 2:

Click **Get Started**.



### Step 3:

Click **+ Add Account**.











### Step 4:

Search for the institution you would like to add. You can search by the institution's name or login URL.

[←](#) Add Accounts

#### Most Popular

 <b>Wells Fargo</b> <a href="http://www.wellsfargo.com/">http://www.wellsfargo.com/</a>	 <b>Fidelity 401k</b> <a href="https://nb.fidelity.com/public/nb/401k/home">https://nb.fidelity.com/public/nb/401k/home</a>
 <b>Bank of America</b> <a href="https://www.bankofamerica.com/">https://www.bankofamerica.com/</a>	 <b>Citibank</b> <a href="https://online.citi.com">https://online.citi.com</a>
 <b>Chase Bank</b> <a href="https://www.chase.com/">https://www.chase.com/</a>	 <b>Discover Card</b> <a href="http://www.discovercard.com/">http://www.discovercard.com/</a>
 <b>American Express Credit Card</b> <a href="https://www.americanexpress.com/">https://www.americanexpress.com/</a>	 <b>US Bank</b> <a href="https://onlinebanking.usbank.com/">https://onlinebanking.usbank.com/</a>

+ Add a Manual Account


### Step 5:

Enter your login credentials. The information requested in MX should match the information requested when you log into the financial institution's website; if the information does not match, you may have added the wrong institution in MX. When all requested information has been entered, click **Connect**.

[←](#)

Add Accounts

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USAA  
[https://www.usaa.com/inet/ent\\_logon/Logon](https://www.usaa.com/inet/ent_logon/Logon)  
  
  
  
  
[Go back](#)

[Need Help?](#)


### Step 6:


Many websites now use two-step authentication, such as sending a code to your phone or email address. In order to add these accounts in MX, you will need to complete these additional steps. If these additional steps need to be taken, the institution may prompt you for this information on the next page.

[←](#)

Add Accounts

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USAA  
[https://www.usaa.com/inet/ent\\_logon/Logon](https://www.usaa.com/inet/ent_logon/Logon)  

 Please provide the following information

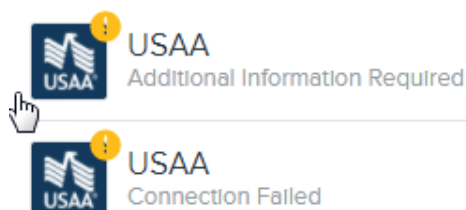
Select option for Secure Activation Code

[Need Help?](#)

## Step 7:

Once all requested information has been provided, MX will retrieve all account data from the institution's site. MX will attempt to gather all accounts that are accessible under the login credentials provided.

If the account is not added successfully, the account will be highlighted on the Accounts page. You can click on the name of the account to get more information on the error, edit your site credentials or to add the account again.



If you need any assistance adding your financial accounts in MX or if you cannot find your financial institution in MX, please use the **Need Help?** button at the bottom of the Add An Account screen or on most error message screens.

A screenshot of the 'Add Accounts' screen. At the top, there is a back arrow and the text 'Add Accounts'. Below this, the Wells Fargo logo is displayed, followed by the text 'Wells Fargo' and the URL 'http://www.wellsfargo.com/'. There are two input fields: 'Username' and 'Password'. Below these fields is a blue 'Connect' button. At the bottom of the form is a 'Go back' link. Below the entire form is a yellow 'Need Help?' button.