

INVESTOR360[®] ACCOUNT AGGREGATION: HOW TO RECONNECT OUTSIDE ACCOUNTS

Although we've worked to ensure that the transition to Quovo is as seamless as possible, you may need to reestablish the link to an outside account the next time you use Account Aggregation. Any sites that were added using our previous Account Aggregation partner, Yodlee, but that Quovo was unable to reconnect, will show in the Additional Assets dashboard with a status of Ready. Follow the process below to open the Additional Assets dashboard and re-link these accounts.

1. From the Overview or Holdings subtab, click **Add/Edit Additional Assets**.

Additional Assets		+Add/Edit Additional Assets
© Advisor Manually Entered Account		
ASSETS \$10,005,196,094.99		
Investment Accounts		
⚠ E*TRADE Securities - Stock Plans - John ***4567 (as of 04/06/2017)		5,820.04
⚠ E*TRADE Securities - Stock Plans - Mason's Coverdell account ***6789 (as of 04/06/2017)		7,530.99

2. Click the **Ready** button in the Sync Status column for each affected account.

+	ACCOUNT	SYNC STATUS	VALUE	PORTFOLIOS	LAST GOOD SYNC
	Chase Bank	Ready	\$0.00	0	-

3. Enter the login credentials.
Click **Sync Account**.

You will be prompted if any further information or action is needed at this point. For more details, please refer to the Additional Assets User Guide.