

# ADDING ACCOUNTS TO MY NET WORTH

## JANNEY ONLINE ACCESS

Your Janney account information will already be uploaded and available. In order to add outside accounts into MY NET WORTH, you must provide the security information (login, password, and in some cases PIN numbers) for each of your outside accounts. MY NET WORTH will use this information to retrieve your account balance(s) and transaction information. All account security information will be encrypted and securely stored.

### STEPS TO ADD YOUR ACCOUNTS

**Step 1:** You must be logged into Janney Online Access.

Click on **My Net Worth tab**. Below that, choose **Add & Manage Accounts tab**.

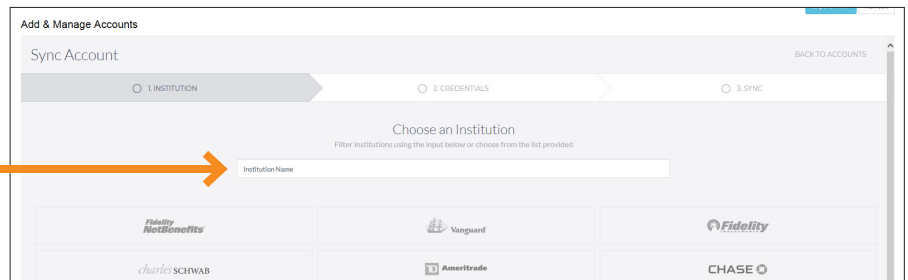
Then choose **+ Add Account**.

The screenshot shows the Janney online interface. The top navigation bar includes 'Accounts', 'Statements & Documents', 'Research & Education', 'Money Transfer/ Bill Pay/Rewards', 'Messages', 'Profile', 'My Net Worth', and 'Welcome, Janney User'. The 'My Net Worth' dropdown menu is open, showing options like 'Net Worth Over Time', 'Asset Allocation', 'Expenses', 'Combined Activity', 'Cash Flow', and 'Add & Manage Accounts'. The 'Add & Manage Accounts' option is highlighted. Below the navigation, the 'Add & Manage Accounts' section displays the account number '012345' and a '+ ADD ACCOUNT' button. The summary shows 2 Total Accounts, 2 Total Portfolios, and a Total Net Worth of \$234,567.89. A table lists the accounts:

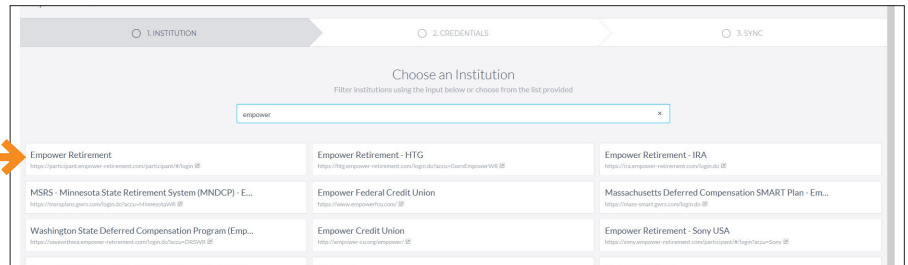
+	ACCOUNT	SYNC STATUS	VALUE	PORTFOLIOS	LAST GOOD SYNC
+	Account 1	Good	\$123,456.78	1	6 Hours Ago
+	Account 2	Good	\$123,456.78	4	14 Hours Ago



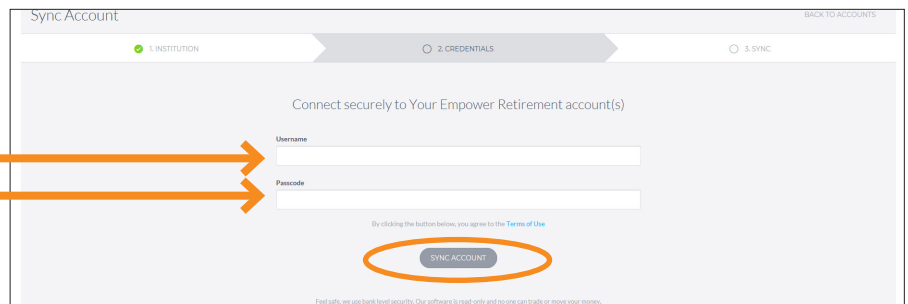
**Step 2: Begin typing** the name of the institution in the search box and options will appear below.



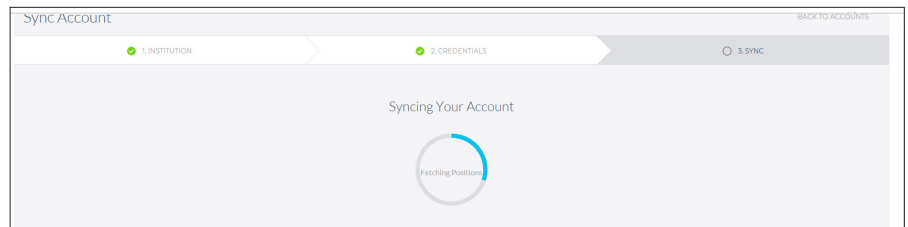
**Step 3: Click** on the institution that matches the name of the company and account you hold.



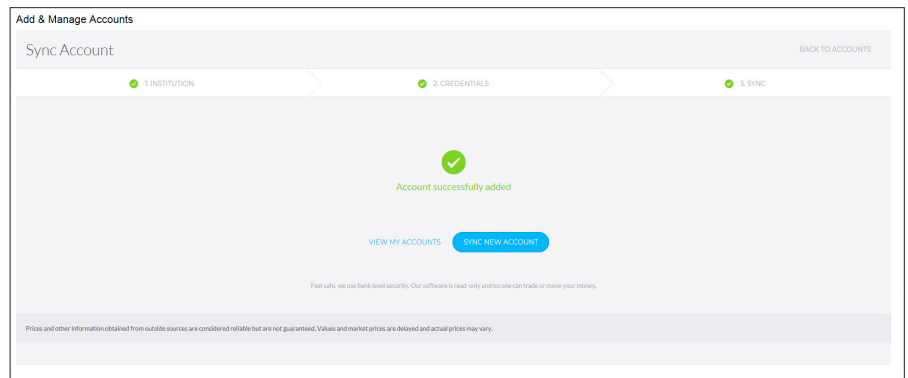
**Step 4: Enter** your User ID and password credentials for the outside account you wish to add, and then **click** the Sync Account button.



For Multi-Factor Authentication, you will need to complete another step. Enter additional password authentication information, such as a PIN number or an answer to a question. Then click the Submit MFA button. Your data will now begin the sync process.



It may take up to 24 hours for data to be displayed in MY NET WORTH.



## Need Assistance?

For further assistance, you may contact the Online Services Department. Please have your Janney account information ready.

Phone: 888.882.0012

Email: [OnlineServices@janney.com](mailto:OnlineServices@janney.com)

Monday through Friday: 7AM – 7PM EST

Saturday, Sunday, and Holidays: 7AM – 12PM EST

