

How to 'Connect an Account' Steps



As a client you can connect accounts from other financial institutions that will help create a more holistic view of your financial picture. You can add accounts such as checking or savings accts, home loans, car loans, credit cards etc.

Login to your account

Click the 'Connect Account' Icon on the banner

Click on the 'Connect Your Accounts' Button on the next page

Search for your institution and click on the tile

Note: you do not need to connect your TCA by E*TRADE accounts, those will automatically connect.

Enter your credentials for that institution

If you need help click on the icon for more information about logging into your account.

You are now connected.