WELLS FARGO Advisors

Account Aggregator User Guide

Getting started

What is Account Aggregator?

The Wells Fargo Account Aggregator can provide you with a full view of your financial world by bringing together your financial accounts at Wells Fargo & Company as well as accounts held elsewhere.

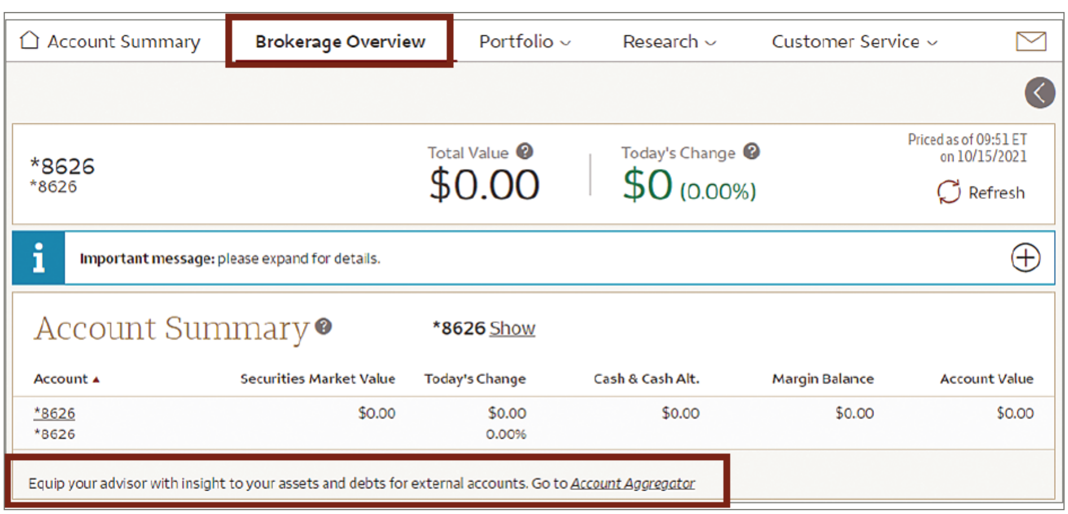
Account Aggregator allows you to include a full breadth of financial accounts from checking and retirement accounts, to credit cards and mortgage loans.

Features and benefits:

- Automatic display of all Wells Fargo account information
- Include non-Wells Fargo assets and liabilities in one view
- Ability to manually add any assets or liabilities not held at a financial institution
- Review updated account balances
- Ability to view your total net worth across all of your accounts

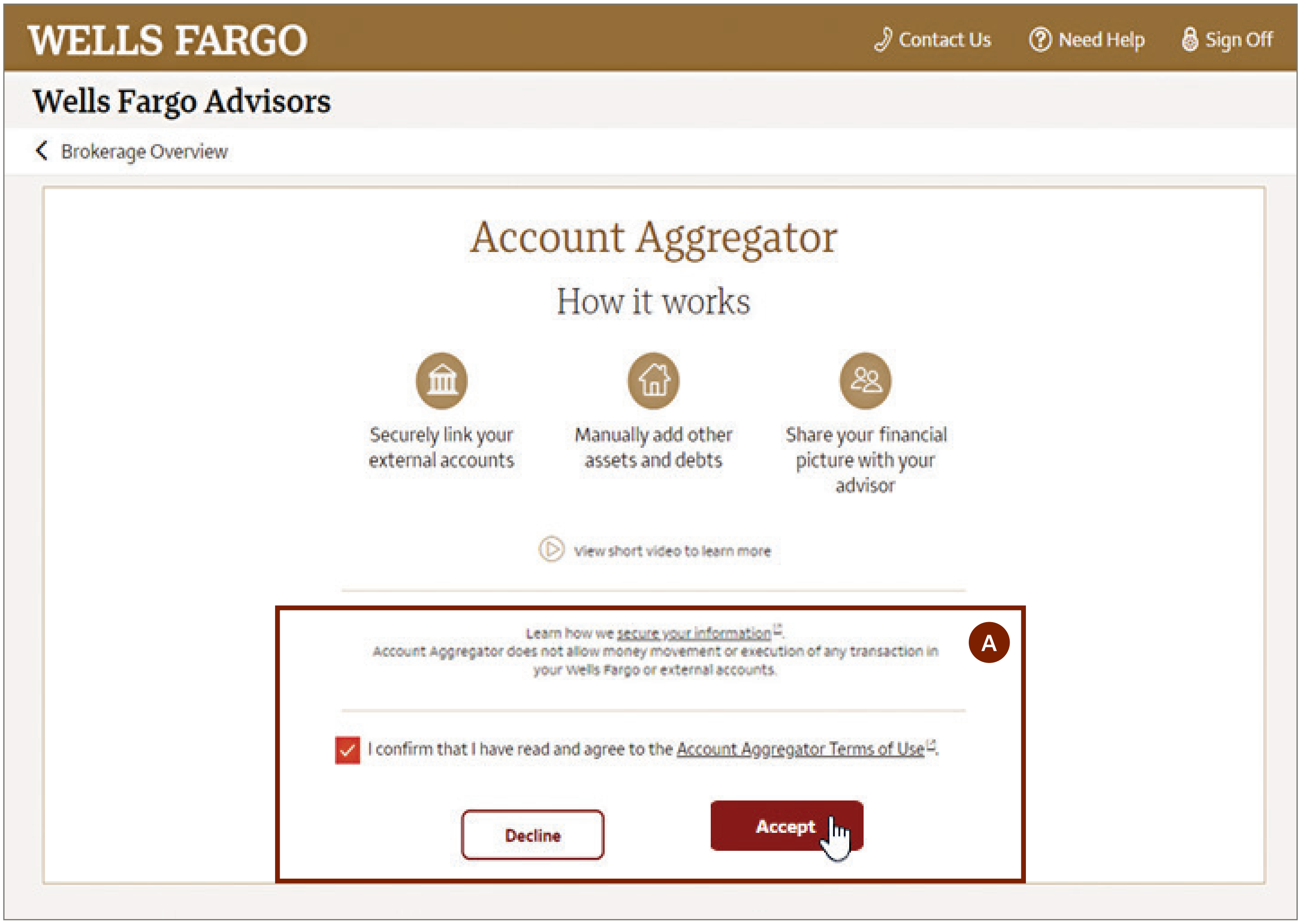
Accessing Account Aggregator

1. Log in to your account through WellsFargoAdvisors.com or wellsfargo.com. You may need to navigate to the online brokerage page.
2. Select the **Brokerage Overview** tab.
3. Selecting the **Account Aggregator** link under the "Account Summary" section will lead to the welcome page.



Welcome screen overview

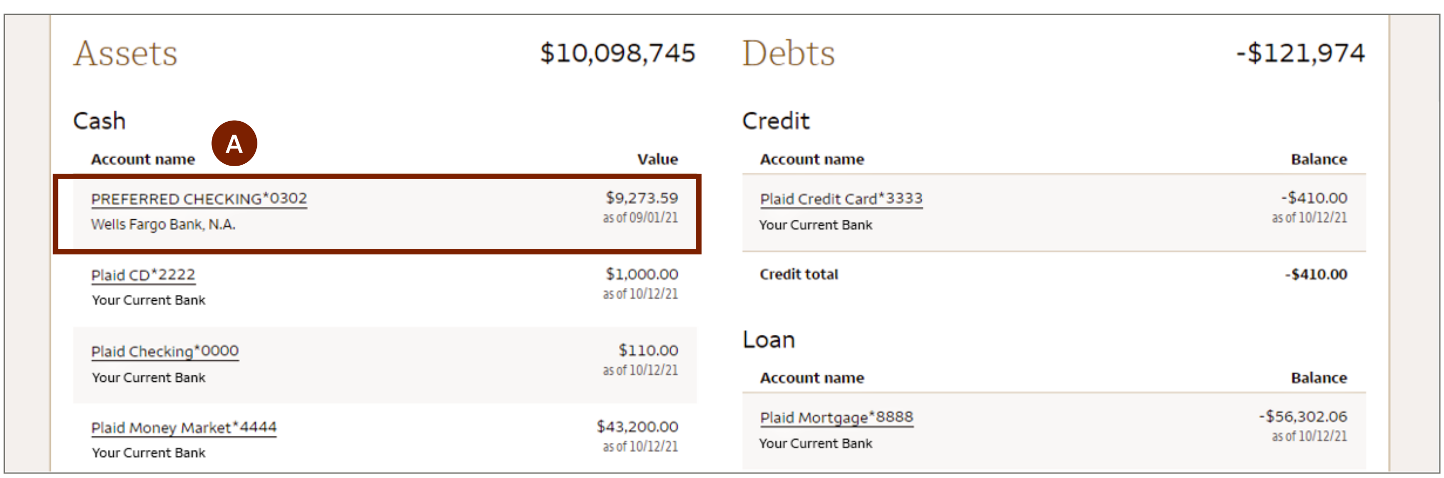
A. Read the Account Aggregator Terms of Use, then check the checkbox confirming you reviewed it, and select **Accept & Continue** button. This will only appear the first time you access the tool. If you choose to decline, you'll be navigated back to the Brokerage Overview page.



Dashboard view

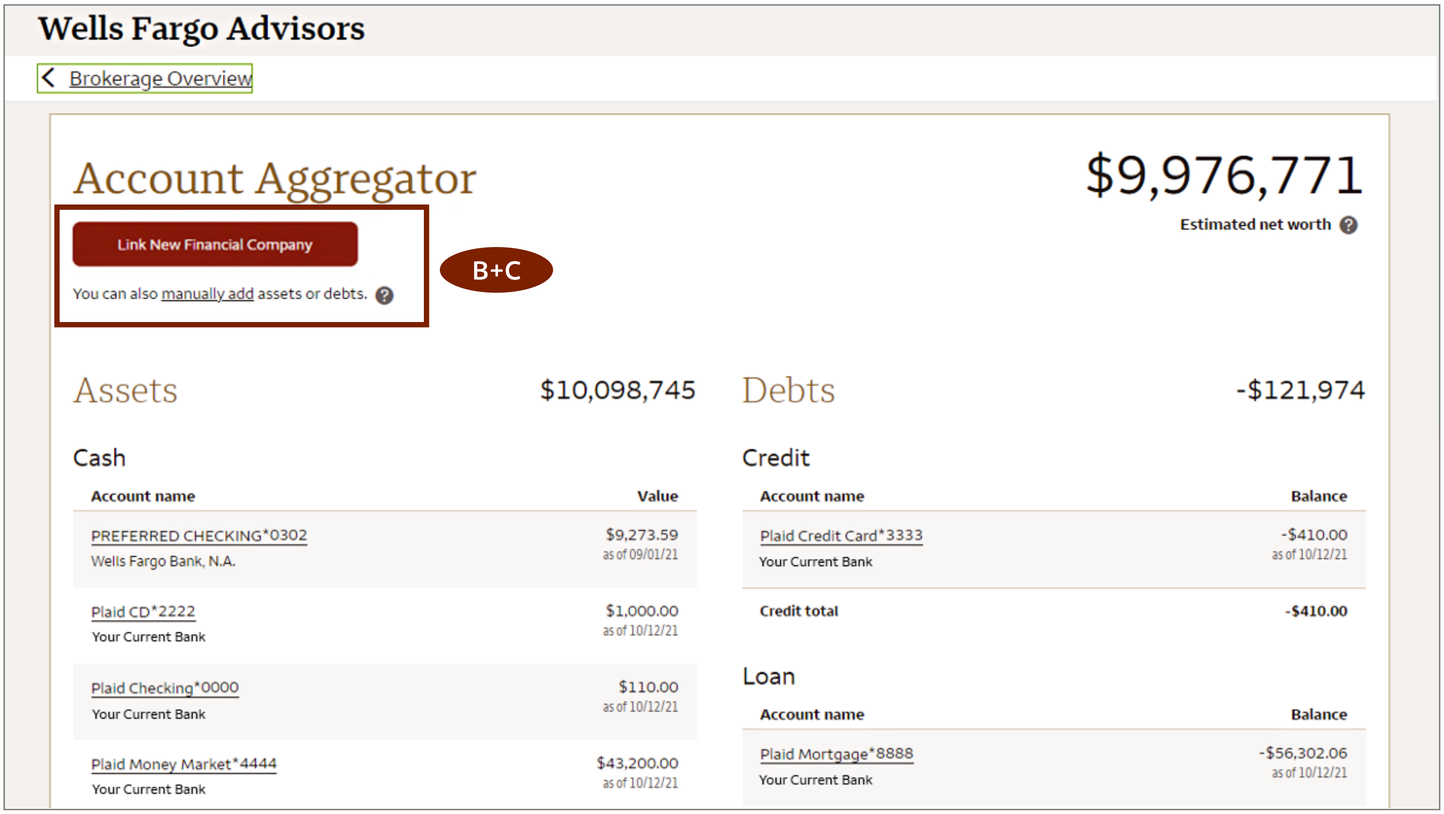
This page lists account information under Assets (cash, investments) and Debts (credit, loan) categories.

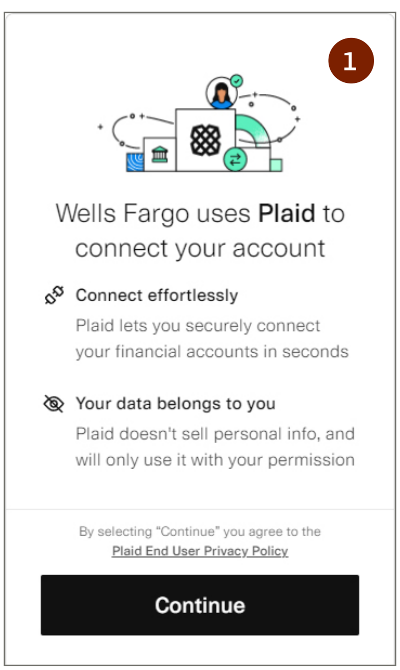
A. Select an individual account to view more details about it on the Account Details page.

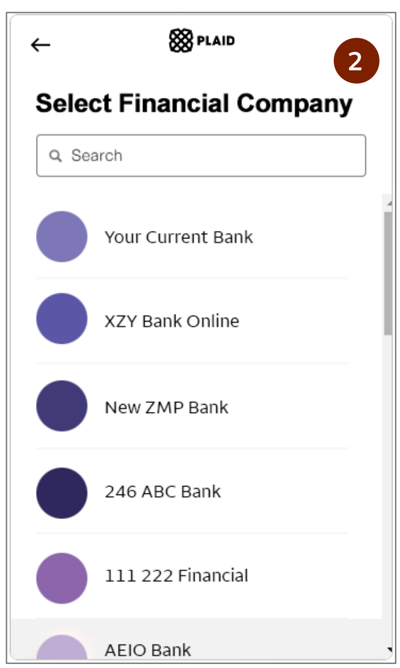


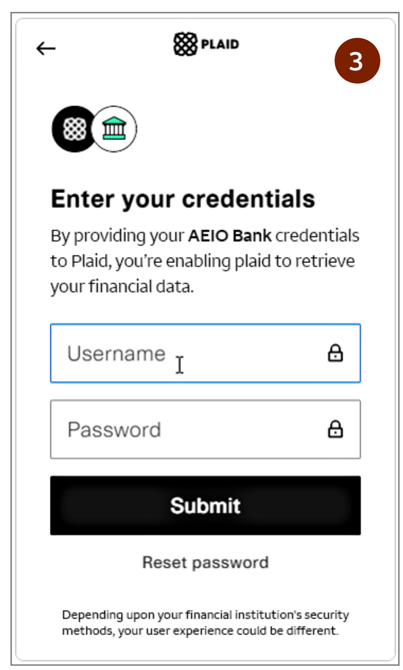
B. To aggregate accounts from external financial institutions, select **Link New Financial Company**.

1. When you select **Link New Financial Company**, you'll navigate to a page that says "Wells Fargo uses Plaid to connect your account." Choose **Continue**.
2. Select your bank (or other financial institution). If you do not see it, use the search bar to retrieve it.
3. Enter your credentials for the selected institution.
4. When the success message displays, select **Continue** to navigate back to Account Aggregator.
5. If you have additional financial companies you work with, simply repeat this process to add those accounts.



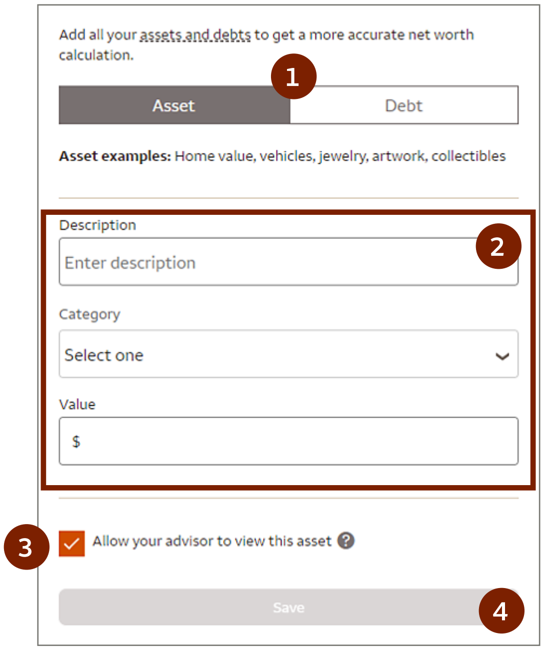


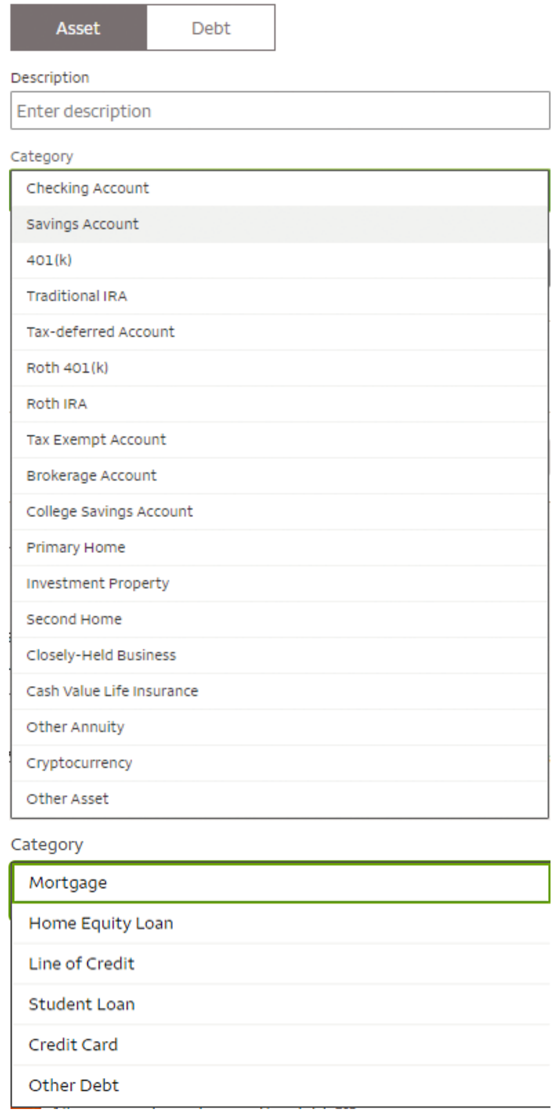




C. To aggregate any missing asset or debt accounts, you can choose the **manually add** link.

1. You'll be navigated to the Manual Asset page. To add a debt account, select the "Debt" tab.
2. Enter the description, select a category from the dropdown, and enter the dollar amount of the account.
3. If you prefer not to share account details with your advisor, deselect the "Allow your advisor to view this asset/debt" checkbox.
4. Select **Save**.





Account Details view

When you select the account name of an individual account on the Dashboard, you'll navigate to the Account Details page. Here, you can see account name, masked account number, type of account, total value, last updated timestamp and select details on the account you are viewing. You also have the ability to add or modify a "nickname" for this account.

You have the ability to control whether your advisor can view an external account by selecting or de-selecting the "Allow your advisor to view this asset/debt" checkbox and choosing **Save**.

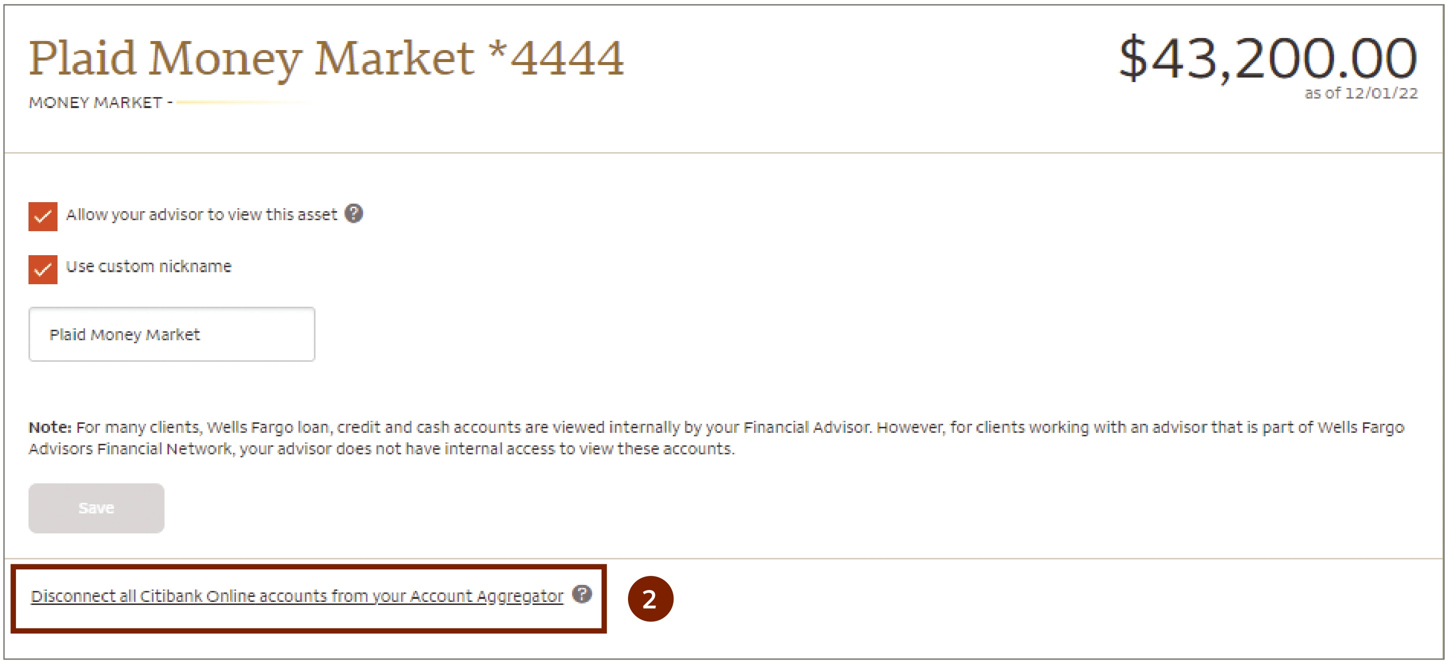
Note: Internal Wells Fargo & Company accounts cannot be hidden from your advisor.

Removing an external account

To remove an external account from your Account Aggregator Dashboard, on the Account Details page, select the **Disconnect all [e.g., Your Current Bank] accounts from your Account Aggregator** link.

Once this link is selected, all accounts associated with that financial institution will be removed from the tool and you will be navigated back to the Dashboard page.

Note: Internal Wells Fargo & Company accounts cannot be deleted from Account Aggregator.



Re-linking an account

If you have lost connection to an external financial institution, follow these steps:

1. Select **Re-Link Account** for any account associated with that financial institution on the Dashboard or on the Account Details page.
2. You'll be taken to a page where you can enter your current account credentials to re-link all of your accounts for the institution and then navigate back to Account Aggregator.