

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.

Account Summary | **Brokerage Overview** | Portfolio ▾ | Research ▾ | Customer Service ▾

*8626
*8626

Total Value ⓘ
\$0.00

Today's Change ⓘ
\$0 (0.00%)

Priced as of 09:51 ET on 10/15/2021
Refresh

i Important message: please expand for details.

Account Summary ⓘ *8626 [Show](#)

Account ▲	Securities Market Value	Today's Change	Cash & Cash Alt.	Margin Balance	Account Value
*8626	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
*8626		0.00%			

Equip your advisor with insight to your assets and debts for external accounts. Go to [Account Aggregator](#)

Investment and Insurance Products are:

- Not Insured by the FDIC or Any Federal Government Agency
- Not a Deposit or Other Obligation of, or Guaranteed by, the Bank or Any Bank Affiliate
- Subject to Investment Risks, Including Possible Loss of the Principal Amount Invested

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.

WELLS FARGO


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Wells Fargo Advisors


< Brokerage Overview


Account Aggregator

How it works

Securely link your external accounts

Manually add other assets and debts

Share your financial picture with your advisor

View short video to learn more

Learn how we [secure your information](#).
Account Aggregator does not allow money movement or execution of any transaction in your Wells Fargo or external accounts.

☒ I confirm that I have read and agree to the [Account Aggregator Terms of Use](#).

Decline

Accept

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.

Assets		\$10,098,745	Debts		-\$121,974
Cash			Credit		
Account name		Value	Account name		Balance
PREFERRED CHECKING*0302		\$9,273.59 as of 09/01/21	Plaid Credit Card*3333		-\$410.00 as of 10/12/21
Wells Fargo Bank, N.A.			Your Current Bank		
Plaid CD*2222		\$1,000.00 as of 10/12/21	Credit total		-\$410.00
Your Current Bank					
Plaid Checking*0000		\$110.00 as of 10/12/21	Loan		
Your Current Bank			Account name		Balance
Plaid Money Market*4444		\$43,200.00 as of 10/12/21	Plaid Mortgage*8888		-\$56,302.06 as of 10/12/21
Your Current Bank			Your Current Bank		

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.

Wells Fargo Advisors

[Brokerage Overview](#)

Account Aggregator

[Link New Financial Company](#)
You can also [manually add](#) assets or debts.

B+C

Assets

\$10,098,745

Cash

Account name	Value
PREFERRED CHECKING*0302 Wells Fargo Bank, N.A.	\$9,273.59 as of 09/01/21
Plaid CD*2222 Your Current Bank	\$1,000.00 as of 10/12/21
Plaid Checking*0000 Your Current Bank	\$110.00 as of 10/12/21
Plaid Money Market*4444 Your Current Bank	\$43,200.00 as of 10/12/21

Debts

-\$121,974

Credit

Account name	Balance
Plaid Credit Card*3333 Your Current Bank	-\$410.00 as of 10/12/21
Credit total	-\$410.00

Loan

Account name	Balance
Plaid Mortgage*8888 Your Current Bank	-\$56,302.06 as of 10/12/21

\$9,976,771

Estimated net worth

Wells Fargo uses Plaid to connect your account

Connect effortlessly
Plaid lets you securely connect your financial accounts in seconds

Your data belongs to you
Plaid doesn't sell personal info, and will only use it with your permission

By selecting "Continue" you agree to the [Plaid End User Privacy Policy](#)

Continue

Select Financial Company

Q Search

- Your Current Bank
- XZY Bank Online
- New ZMP Bank
- 246 ABC Bank
- 111 222 Financial
- AEIO Bank

Enter your credentials

By providing your **AEIO Bank** credentials to Plaid, you're enabling plaid to retrieve your financial data.

Username

Password

Submit

[Reset password](#)

Depending upon your financial institution's security methods, your user experience could be different.

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**.

Add all your ~~assets and debts~~ to get a more accurate net worth calculation.

1

Asset Debt

Asset examples: Home value, vehicles, jewelry, artwork, collectibles

2

Description
Enter description

Category
Select one

Value
\$

3

☒ Allow your advisor to view this asset ?

4

Save

Asset Debt

Description
Enter description

Category

Checking Account
Savings Account
401(k)
Traditional IRA
Tax-deferred Account
Roth 401(k)
Roth IRA
Tax Exempt Account
Brokerage Account
College Savings Account
Primary Home
Investment Property
Second Home
Closely-Held Business
Cash Value Life Insurance
Other Annuity
Cryptocurrency
Other Asset

Category

Mortgage
Home Equity Loan
Line of Credit
Student Loan
Credit Card
Other Debt

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.

Plaid Money Market *4444 \$43,200.00
MONEY MARKET - as of 12/01/22

☒ Allow your advisor to view this asset ?

☒ Use custom nickname

Plaid Money Market

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.

Plaid Money Market *4444

MONEY MARKET -

\$43,200.00

as of 12/01/22

☒

Allow your advisor to view this asset ?

☒

Use custom nickname

Plaid Money Market

Note: For many clients, Wells Fargo loan, credit and cash accounts are viewed internally by your Financial Advisor. However, for clients working with an advisor that is part of Wells Fargo Advisors Financial Network, your advisor does not have internal access to view these accounts.

Save

Disconnect all Citibank Online accounts from your Account Aggregator ?

2

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.

Brokerage*6716	\$579.50
111 222 Financial	<div>⚠ Re-Link Account</div>
Plaid 401k*6666	\$23,631.98
111 222 Financial	<div>⚠ Re-Link Account</div>
Plaid IRA*5555	\$320.76
Your Current Bank	<div>⚠ Re-Link Account</div>
Investments total	\$24,532.24