

# CompleteView

**E\*TRADE**<sup>®</sup>  
ADVISOR SERVICES

Get a more complete picture  
of all your finances in one place



## CompleteView makes managing your personal finances easier

CompleteView is a tool available to you through your financial advisor. Providing a clearer view of your total financial situation, CompleteView allows you to link accounts from more than 14,000 institutions, including banks, investment firms, 401(k) providers, and other financial service providers.

CompleteView then consolidates this financial data to provide you with a holistic, easily viewed perspective on your current financial situation.

Having a single place that consolidates your overall financial data across many accounts can help provide you with a deeper understanding of your complete financial picture, as you consider financial decisions for yourself and your family.

## Consider the benefits

- **Financial insight.** You will be able to access up-to-date account balance information for any of the accounts you link anytime, anywhere.
- **Convenience.** You can easily monitor your accounts through a single online interface without regularly entering different log-on credentials for each supported financial institution or account, or finding and reviewing multiple paper statements. This can save you time and confusion, improve accuracy, and help facilitate better meetings with your financial advisor.
- **Easier recordkeeping.** CompleteView also aids in simplifying your recordkeeping. By having your financial data collated in one place, you can view your assets and liabilities for a clearer view of your total financial situation.
- **Budgeting.** CompleteView includes several personal financial management features for your convenience. These tools can help you budget, set goals, and analyze spending by category, so you know where your money is going.

By linking your outside accounts to CompleteView, you can easily monitor your accounts through a single online interface, providing more clarity and convenience as you manage your entire financial situation.



# Getting to your E\*TRADE Advisor Services account from CompleteView

As a client, getting to your E\*TRADE Advisor Services accounts takes one simple click.

## Log on to your account

**ASSETS**

Account	Name	Type
543021	THERESSA MACISAAC	IRA - Individual Retirement Account
***5974	THERESSA MACISAAC	Brokerage Account
***0993	THERESSA MACISAAC	Brokerage Account
***6132	THERESSA MACISAAC	Brokerage Account
***6782	THERESSA MACISAAC	Brokerage Account

Scroll to the Assets section of the screen. Your E\*TRADE Advisor Services accounts will be listed at the top of the list.

## Returning to CompleteView

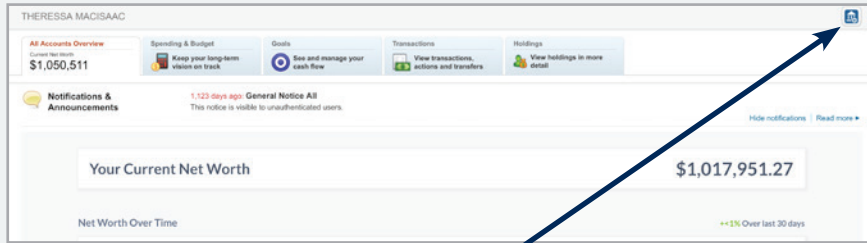
[Return to CompleteView](#)

Simply click on the "Return to CompleteView" link in the upper right-hand portion of the screen to return to CompleteView.

# Getting started connecting accounts

Connecting accounts from other financial institutions helps to create a more holistic view of your financial picture.

## 1 Log on to your account and look for the Connect Account icon.

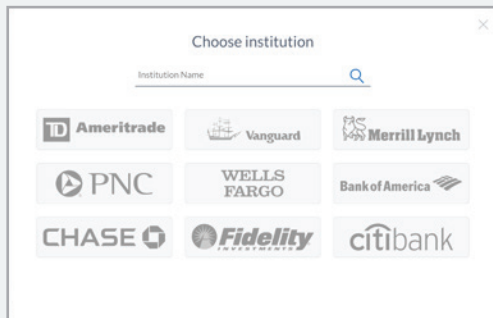


Connect Your Accounts

Click the 'Connect Account' icon on the banner.

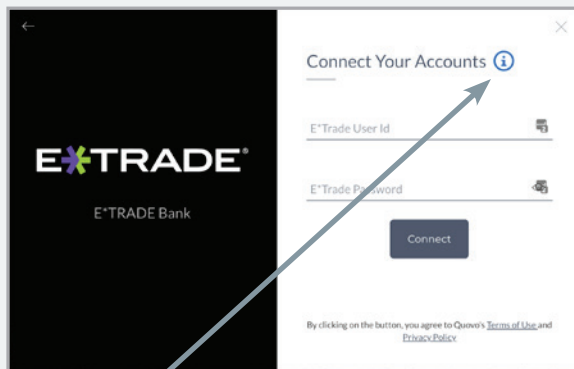
On the next page, click the "Connect Your Accounts" button.

## 2 Search for your institution by typing the name in the search, and click on the tile.

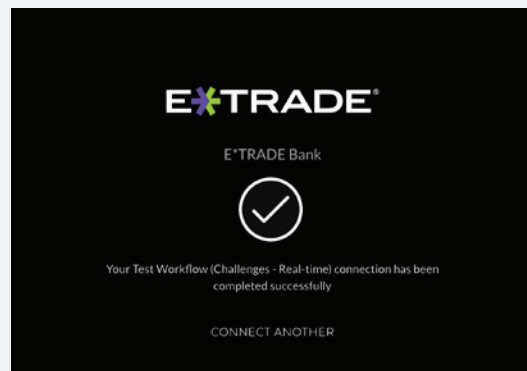


► **NOTE:** You do not need to connect your E\*TRADE Advisor Services accounts; those will automatically connect.

## 3 Enter your credentials for that institution.



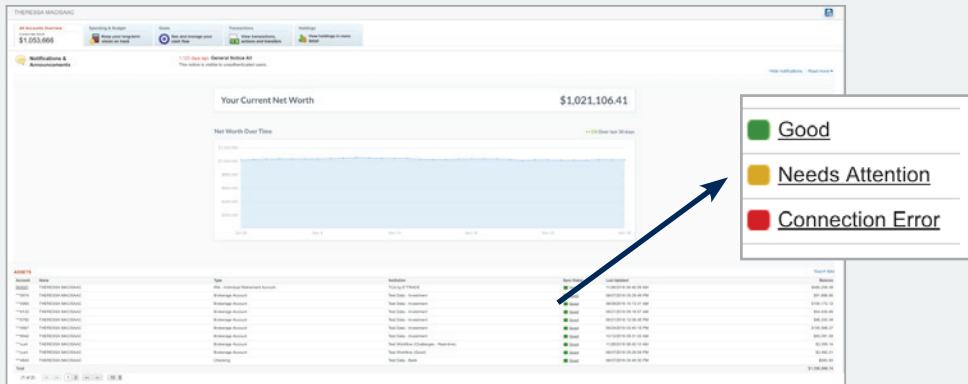
If you need help, click on the icon for more information about logging on to your account.



► You are now connected!

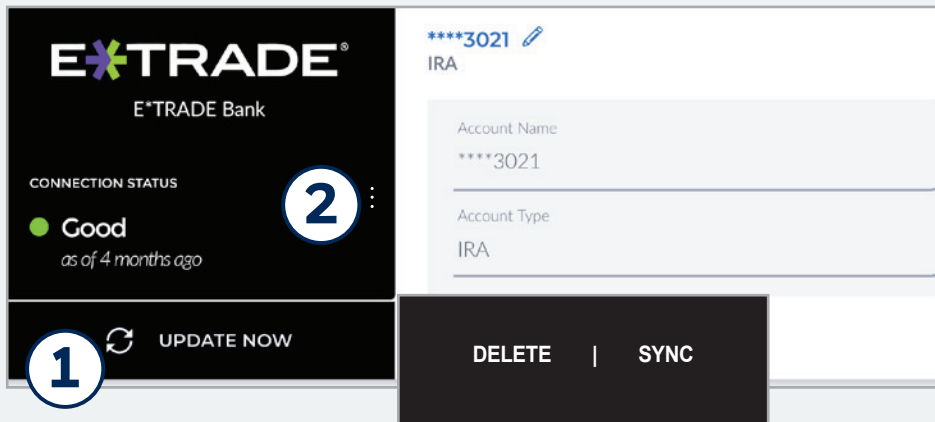
## How to maintain a connected account

After connecting your outside accounts, you will see your information flowing through from your financial institution. But what if you need to update your password for a connected account, or remove a connected account that you no longer need to see on your All Accounts Overview page?



On the All Accounts Overview, “Sync Status” will allow you to quickly see any accounts that may need an update. Click on the “Sync Status” link to re-sync or maintain any of your accounts.

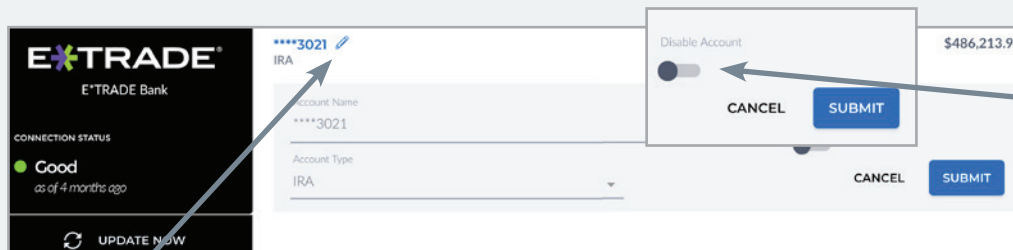
### To manually sync an account.



Scroll over the institution you want to re-sync. You have two ways to sync the account:

1. Click the “Update Now” button.
2. Click on the three dots and click on “SYNC” or “Delete.”

### Maintenance account details



You can also use the sliding tool to disable an account. This will keep the account linked, but the account will not appear within the “All Accounts” view.

To update the account name or account type, click on the pencil icon.

# We maintain risk controls to protect your data

As a part of our commitment to information and network security, CompleteView utilizes encryptions for data transmissions and endpoint authentication with API access tokens to help keep account information confidential and secure.



- **How is data protected?** After entering log on information from a financial institution, CompleteView uses that information to aggregate accounts, and then stores it securely. The data is stored on servers in a secure location that includes physical security, fire protection, and electronic shielding. Accessing the physical servers requires several levels of authentication, including biometrics, and security personnel monitor the system around the clock.
- **Where does my data go and how does it get there?** Data from CompleteView is transmitted only to the websites and/or mobile applications where you have permitted access. All transmissions are encrypted.

**For more information or to begin using CompleteView, please contact your financial advisor.**

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#### **Investment Products: Not FDIC Insured - No Bank Guarantee - May Lose Value.**

System response and account access times may vary due to a variety of factors, including trading volumes, market conditions, system performance, and other factors

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