

## How to Connect Accounts to Your DVI Client Portal

For a more comprehensive overview of your personal financial information, you can connect accounts that are not managed by DVI to your DVI Client Portal. Consider connecting your bank accounts, non-DVI managed investments, loans, life insurance policies and properties.

In this user guide we will demonstrate how to set up your Connections.

Note – You must already have online access to your accounts through your financial institution(s) in order to connect your accounts to your DVI Client Portal

1. Click on **Add** in the Accounts section under the Home page.

The screenshot shows the DVI Client Portal Home page. The navigation bar includes 'Home' (circled in red), 'Organizer', 'Investments', 'Vault', 'Reports', 'Help', 'Settings', and 'Sign Out'. The main content area features several widgets: a user profile for Jeff Huizenga CFP®, ChFC; 'NET WORTH' (\$15,420,358); 'INVESTMENTS' (\$7,565,640); 'ACCOUNTS' (with a red circle around the '+ Add' button); 'PROTECTION'; and 'AWARDS'. The 'ACCOUNTS' widget lists Cash (\$0), Credit Cards (\$0), Investments (\$7,545,240), Life Insurance (\$0), Loans (\$0), and Property (\$14,500,000).

2. Enter the institution name or website address in the search bar and click **Search**.

The screenshot shows the 'Add Accounts' page in the DVI system. At the top, there is a navigation bar with the DVI logo and links for Home, Organizer, Investments, Vault, Reports, Help, Settings, and Sign Out. Below the navigation bar, there is a 'Go back to Home' link and the heading 'Add Accounts'. The main content area contains the instruction 'Enter your institution's name or website address' above a search input field. The input field contains the text 'example 'My Bank' or 'www.mybank.com'' and is highlighted with a red oval. To the right of the input field is a blue 'Search' button, also highlighted with a red oval. Below the search field is a 'Cancel' link.

3. From the list of results, select the correct institution.

The screenshot shows the DVI Client Portal interface. At the top, there is a navigation bar with the DVI logo and links for Home, Organizer, Investments, Vault, Reports, Help, Settings, and Sign Out. The main content area is titled 'Add Accounts' and includes a 'Go back to Home' link. Below this is a search prompt: 'Enter your institution's name or website address'. A search input field contains the text 'Vanguard' and a 'Search' button. Below the search bar, it says 'Search results (4 matches found)'. The results are listed in two columns: 1. Vanguard (circled in red), 2. Vanguard Retirement Web Site (Ascensus) : Ascensus Retirement, 3. Vanguard Charitable Endowment Program, and 4. Bay Vanguard : FIServ (PBI-Personal). A 'Cancel' button is located at the bottom of the results list.


Note – For some institutions, the DVI Client Portal may require you to perform additional steps that are necessary for creating and maintaining a connection with that specific institution.

At this point, the DVI Client Portal will automatically re-direct you to a page with the additional instructions. Once you have carried out the instructions, return to the DVI Client Portal site and click **Continue** to proceed to the next step.

4. Enter your credentials for your account(s) at the chosen institution and click **Connect**.

**DVI** Home Organizer Investments Vault Reports Help Settings Sign Out

Go back to Home  
**Add Accounts**

 **Vanguard**  
personal.vanguard.com

To connect to your accounts, enter your credentials below.

User ID

User Password

Connect

Previous Step Cancel

Note – The system will take a moment to verify and retrieve your information.

**DVI** Home Organizer Investments Vault Reports Help Settings Sign Out

Go back to Home  
**Add Accounts**

⌄ Verifying your credentials. Please wait...

5. The account values are pulled through onto the accounts page.

The screenshot shows the DVI Accounts page. At the top, there is a navigation bar with 'Home', 'Organizer', 'Investments', 'Vault', and 'Reports'. On the right side of the navigation bar are 'Help', 'Settings', and 'Sign Out'. Below the navigation bar, there is a 'Go back to Organizer' link and an 'Add' button. The main heading is 'Accounts'. Below this, there is a section for 'Other Accounts' with a table listing two accounts:

Account Name	Account Type	Last Synced	Balance
Investment Account	Taxable Investment	06/14/2016 04:00PM	\$2,545,240
† Taxable Investments	Taxable Investment	08/28/2015 03:14PM	\$5,000,000

6. To maintain the connection, see options in the upper right corner.

This is a close-up screenshot of the 'Accounts' page. It shows a summary of account types: 8 Cash, 8 Credit Cards, 15 Investments, 19 Insurance, 4 Loans, and 4 Others. In the bottom right corner, there is a red oval highlighting four management options: 'delete' (trash icon), 'settings' (gear icon), 'find new' (glasses icon), and 'refresh' (refresh icon). A '+ Add' button is visible in the top right corner.