

December 2021

## Wells Fargo Account Aggregator

**Investment and Insurance Products: > NOT FDIC Insured > NO Bank Guarantee > MAY Lose Value**

### ***[On-screen graphic – Wells Fargo Account Aggregator Your holistic financial picture in one place]***

With Wells Fargo Account Aggregator you can view your entire financial picture. An important step in ensuring your long-term financial success. You'll be able to see all of your Wells Fargo and non-Wells Fargo accounts in one place. Select from and view a full-breadth of account types from your investment accounts, to credit cards, to your mortgage—giving you a holistic view of your total portfolio and net worth. And when you have created your full financial picture Account Aggregator can automatically share it with your advisor for help in making life's important financial decisions.

It's easy to use. To begin, when logged into your Wells Fargo Advisors account—under the Brokerage Overview tab you'll find the Account Aggregator link just below Account Summary. Confirm you've read the Terms of Use and select Accept & Continue. Within Account Aggregator all of your Wells Fargo accounts will automatically be displayed. To aggregate accounts from external financial institutions select Link External Account.

If you don't see the financial institution you are looking for you can search from more than 11,000 banks, brokerages and other financial services providers. Enter the credentials you use to access your account for the institution you selected. When successful select continue to navigate back to Account Aggregator. Once the link is established account values are updated. Repeat the process to link additional accounts. To make sure your financial picture is as complete as possible, you can choose to manually include additional assets or debts, if needed.

Make sure you log into your Wells Fargo Account regularly to get an updated view of your entire net worth. Knowing your full financial picture can contribute to your long-term financial success.

### ***[On-screen graphic – Wells Fargo Account Aggregator For more information contact your Wells Fargo Advisors Financial Advisor]***

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