Video Title: How to Link Accounts

Description: What is data aggregation, how to link an account, security and privacy

Read Time: 1.2 minutes

Target Audience: Investors

Script: See Page 2

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| **VO** | **Words on Screen** | **Visuals** |
| We provide an account linking service that allows you as an investor to link all your financial accounts so you can see a holistic view of your personal wealth. It enables you and your advisor to create a more personalized plan that includes every aspect of your financial picture. | Data Aggregation   * Holistic view of your net worth * Complete financial picture * Personalized advisor-client experience |  |
| The process to link your accounts is simple:   * First you will review and accept the user agreement * Next you will be prompted to choose your financial institution, either from the list of frequently used institutions or by using the search bar * Then you will enter your account username and password * In most cases, you will need to complete additional authentication to verify your identity. * Once we have successfully connected to your financial institution, you will be able to check and uncheck the accounts you wish to link. | 1. Accept first-time user agreement 2. Choose financial institution 3. Enter credentials 4. Multi-factor authentication 5. Choose accounts to aggregate   \*No words on screen, just UI steps |  |
| A note on security and privacy:  Morningstar ByAllAccounts highly prioritizes security and privacy. All information is encrypted so that it remains safe and secure. Morningstar ByAllAccounts does not sell your data and only uses it for the purposes you intend it to be used for. | A word on security and privacy:   * 20+ years of industry expertise * Highly prioritizes security & privacy * Information is encrypted * Does not sell your data |  |
|  | Start Linking Your Accounts Today |  |