DVI
DAVID VAUGHAN INVESTMENTS

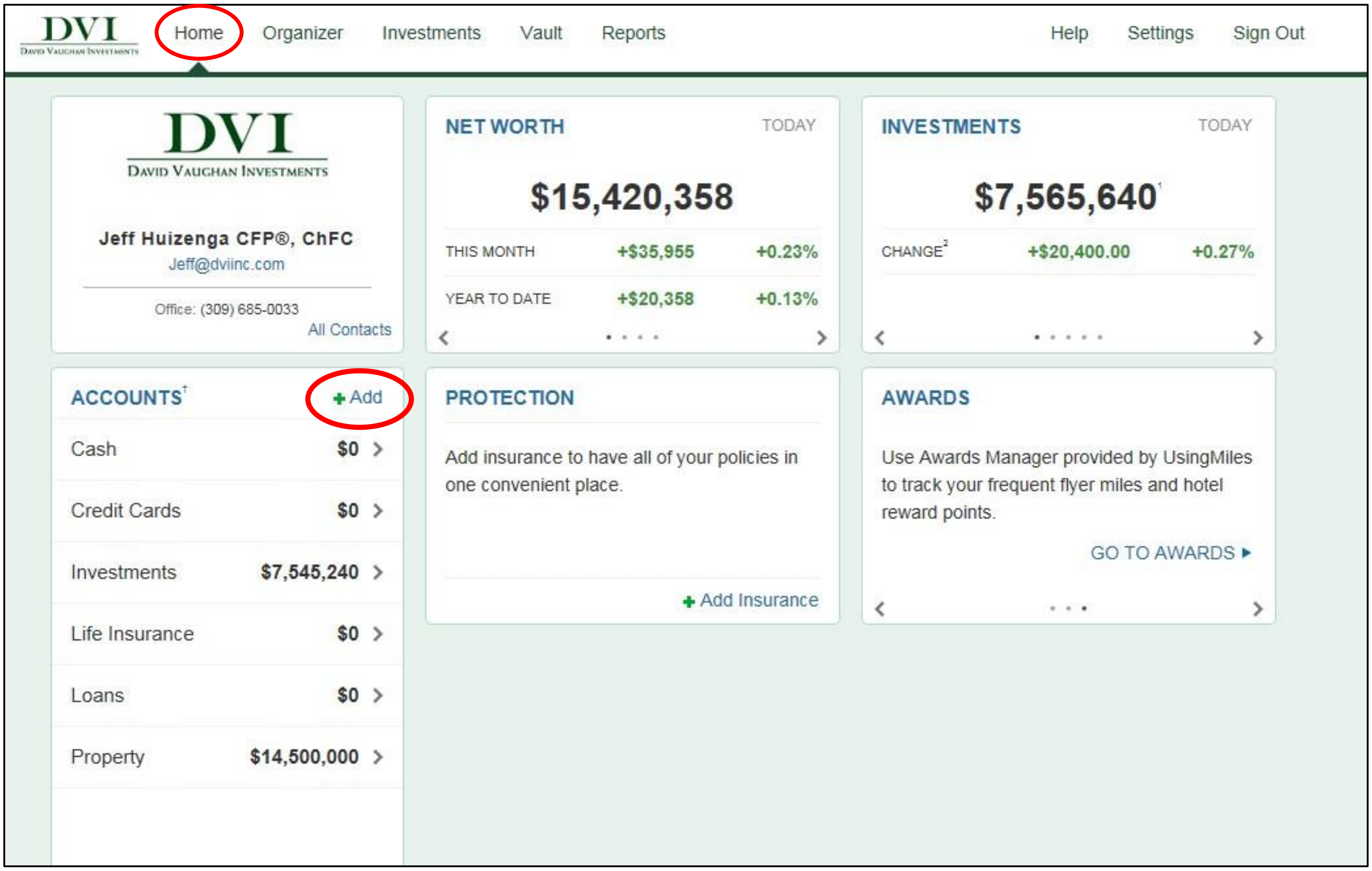
How to Connect Accounts to Your DVI Client Portal

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.

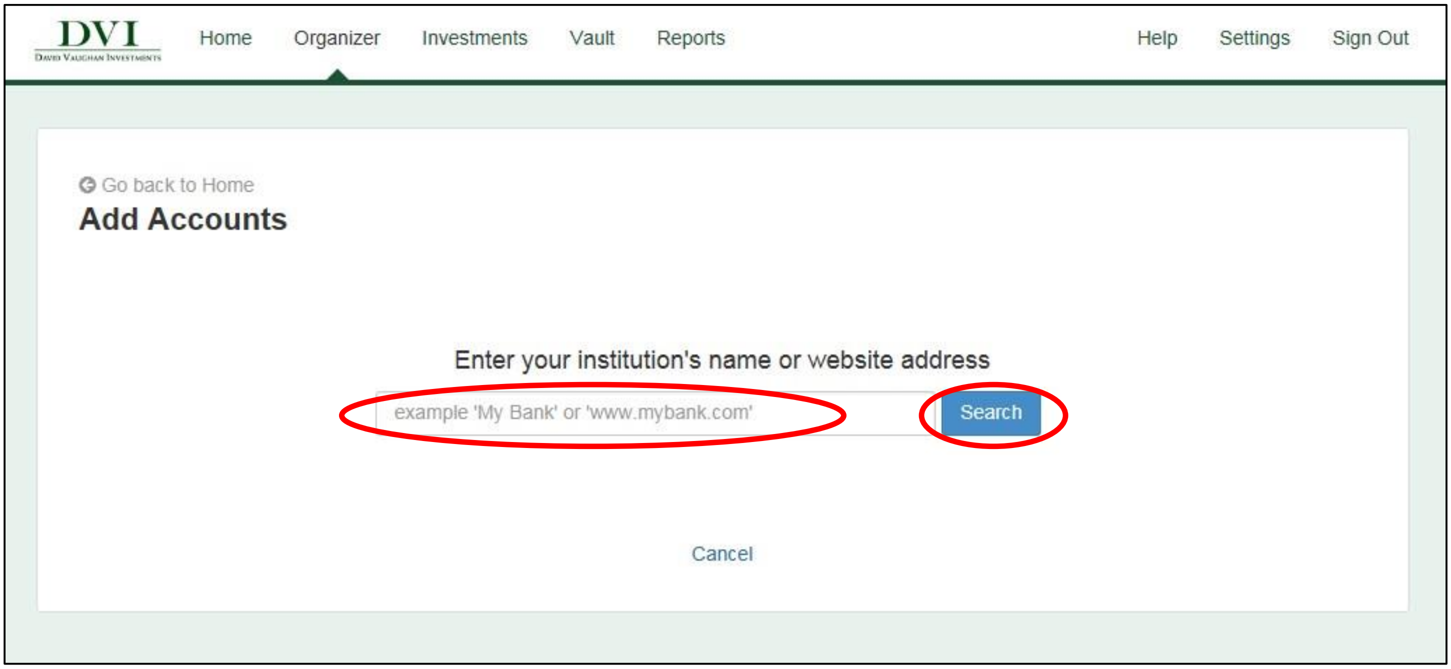
In this user guide we will demonstrate how to set up your Connections.

> 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

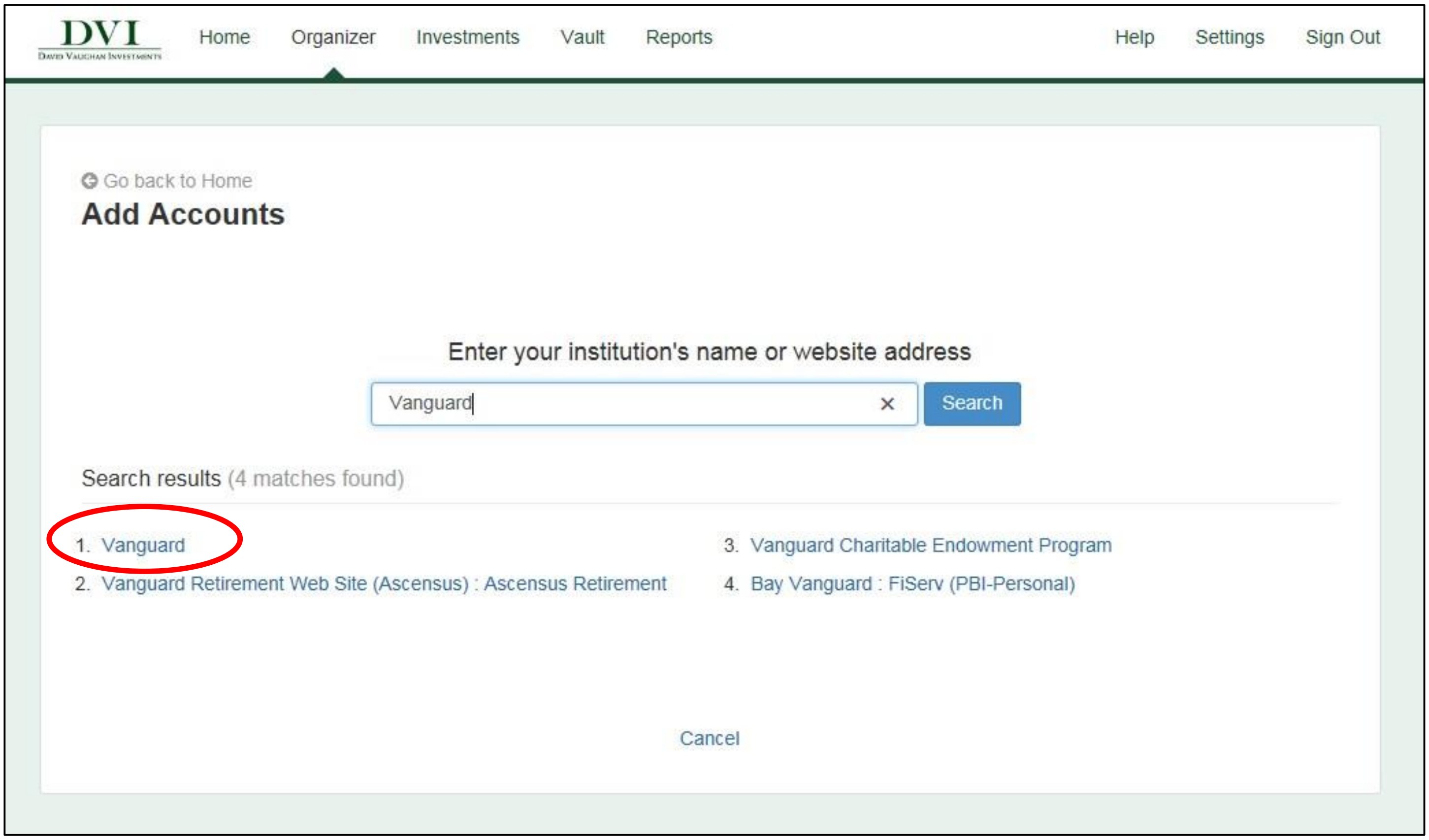
1. Click on **Add** in the Accounts section under the Home page.



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



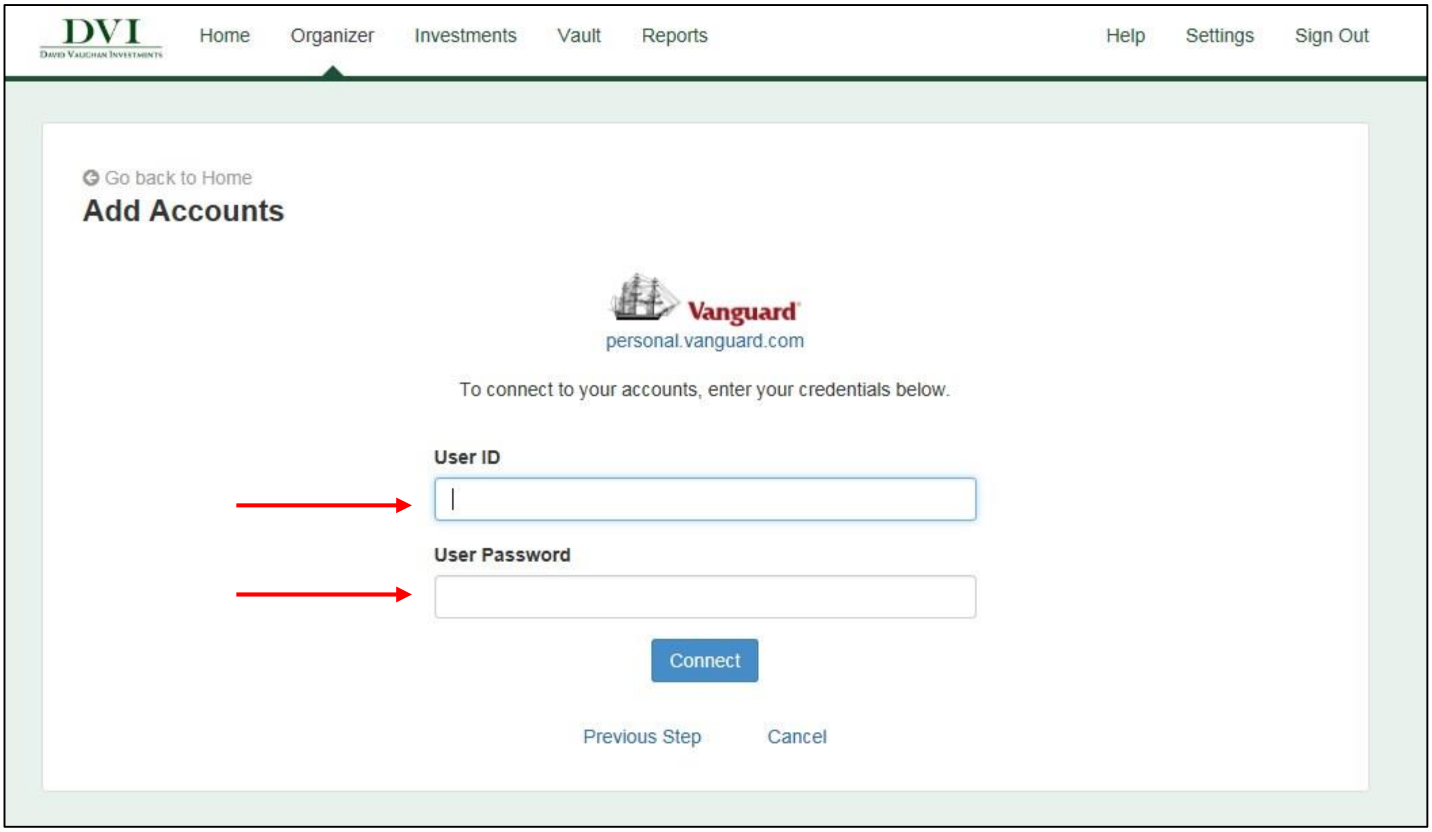
3. From the list of results, select the correct institution.



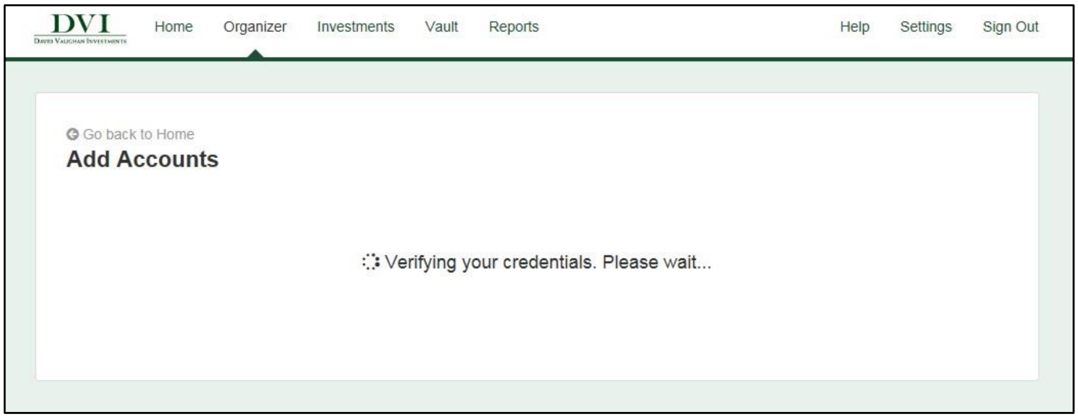
Note – For some institutions, the DVI Client Portal may require you to perform additional steps that are necessary for creating and maintaining a connection with that specific institution.

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.

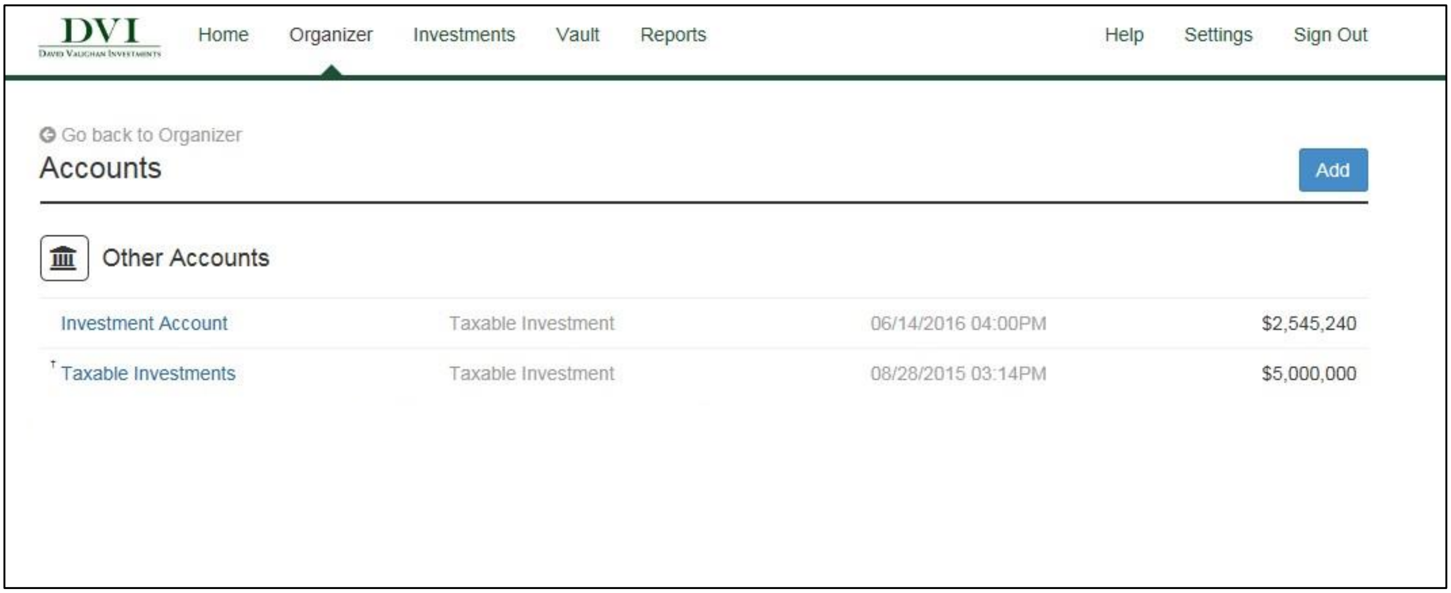
4. Enter your credentials for your account(s) at the chosen institution and click **Connect**.



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



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



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