
Estimated Net Worth User Guide

Getting started

What is Estimated Net Worth ?

The Estimated Net Worth feature can help you with a more complete view of your financial picture by bringing together your financial accounts, including external accounts held outside of Wells Fargo.

Estimated Net Worth allows you to include your financial accounts, such as checking, retirement, credit cards, and mortgage in one consolidated view.

Features and benefits:

- Automatic display of all Wells Fargo account information
- Include non-Wells Fargo assets and liabilities in one view
- Ability to manually add any assets or liabilities not held at a financial institution
- Review updated account balances
- Allows your advisor the ability to view your external accounts when you grant access.

Notes:

- Not all financial institutions may be available for aggregation
- Aggregation from other financial institutions may be limited at some times due to system issues or downtimes at selected institution
- Accuracy and timeliness of data shown for external assets and liabilities cannot be guaranteed
- Manually entered assets and liabilities not linked to other financial institutions may not reflect current values

Investment and Insurance Products are:

- **Not Insured by the FDIC or Any Federal Government Agency**
- **Not a Deposit or Other Obligation of, or Guaranteed by, the Bank or Any Bank Affiliate**
- **Subject to Investment Risks, Including Possible Loss of the Principal Amount Invested**

Accessing Estimated Net Worth

1. Log in to your account through WellsFargoAdvisors.com or wellsfargo.com. You may need to navigate to the online brokerage page.
2. Select the **Brokerage Overview** tab.
3. Select the **Estimated Net Worth** link under the Portfolio tab.

The screenshot displays the Wells Fargo Advisors interface. At the top, the 'Wells Fargo Advisors' header includes navigation links for 'Transfer & Pay', 'Trade', 'Get Quote: Symbol or Co.', and 'Sign Off'. Below this, the 'Portfolio' tab is selected, and a sub-menu is visible with 'Estimated Net Worth' highlighted in a red box. The main content area is divided into three sections: 'Account Summary', 'Holdings Snapshot', and 'Asset Allocation'.

Account Summary

*0259 [Show](#)

Account	Securities Market Value	Today's Change	Cash & Cash Alt.	Margin Balance	Account Value
Test_1 *0259	\$17,725.47	+\$20.21 +0.11%	\$1,400.64	\$0.00	\$19,126.11

Holdings Snapshot

Asset Class	Market Value	Today's Change
Stocks	\$17,277.62	+\$20.88 (+0.12%)
ETFs	\$447.85	-\$0.67 (-0.15%)
Cash/Cash Alternatives	\$1,400.64	-

[See More >](#)

Asset Allocation

The donut chart illustrates the asset allocation. The largest segment is 'Equities' (blue), followed by 'Cash Alternatives' (green), and a very small segment in red. The chart is labeled with 'Equities' and 'Cash Alternatives'.

Dashboard view

This page lists account information under Assets (cash, investments) and Debts (credit, loan) categories.

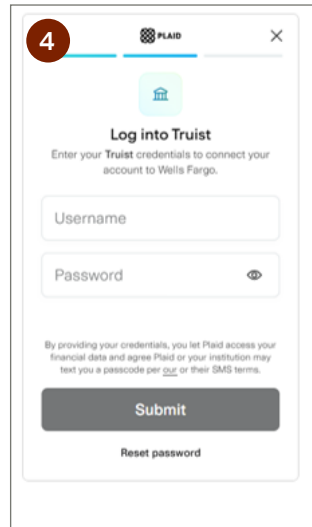
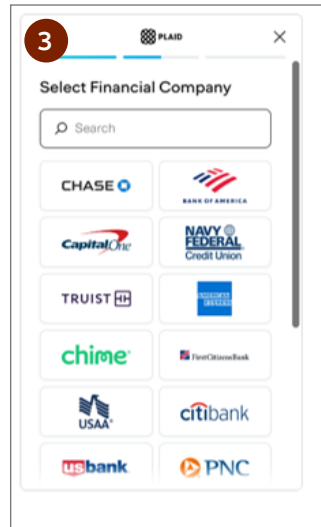
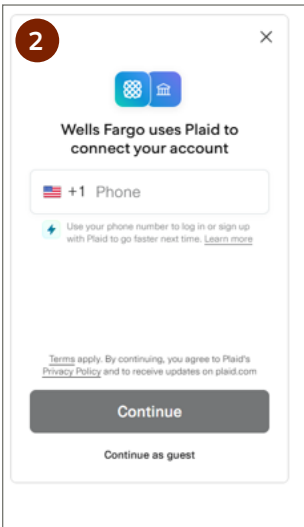
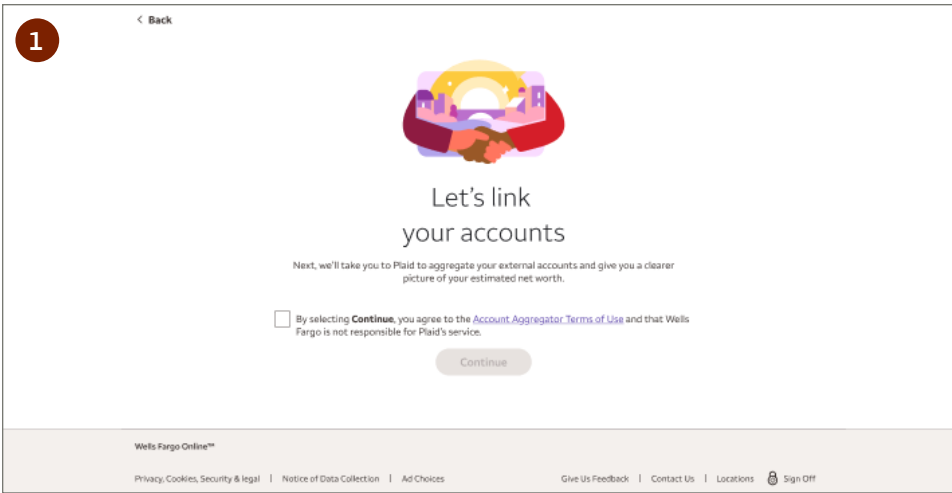
A. Select an individual account to view more details about it.

The screenshot shows the Wells Fargo Advisors dashboard. At the top, it says "WELLS FARGO" and "Sign off". Below that, it says "Wells Fargo Advisors" and "< Back". The main heading is "Estimated net worth* ①" with a large value of "\$1,157,731.52" and "As of 08/01/2025". A notification bar says "Your account is now connected to Wells Fargo". Below that, there are three buttons: "A" (a refresh icon), "B" (a plus icon), and "C" (a minus icon). The "B" button is labeled "Link accounts" and the "C" button is labeled "Add manually". Below these buttons is a table with two columns: "Assets" and "Debts". The "Assets" column has a total of \$1,254,088.58 and lists accounts like "PREMIER CHECKING *0987", "BROKERAGE IRA *7812", "SAVINGS *0987", and "CHECKING JOINT *3650". The "Debts" column has a total of \$236,961.04 and lists accounts like "WELLS FARGO AUTOGRAPH VISA® CARD *3478" and "MORTGAGE *3563". At the bottom, there is a link "How estimated net worth works >".

Assets	\$1,254,088.58	Debts	\$236,961.04
PREMIER CHECKING *0987 Wells Fargo Bank	\$21,240.78 As of 04/09/2025	WELLS FARGO AUTOGRAPH VISA® CARD *3478 Wells Fargo Bank	\$2,431.10 As of 04/09/2025
BROKERAGE IRA *7812 Wells Fargo Advisors**	\$1,085,462.45 As of 04/09/2025	MORTGAGE *3563 Merrill Lynch	\$231,240.78 As of 04/09/2025
SAVINGS *0987 Chase	\$53,983.10 As of 04/09/2025		
CHECKING JOINT *3650 Chase	\$5,189.16 As of 04/09/2025		
Student Loan	\$30,000.00 As of 04/09/2025		

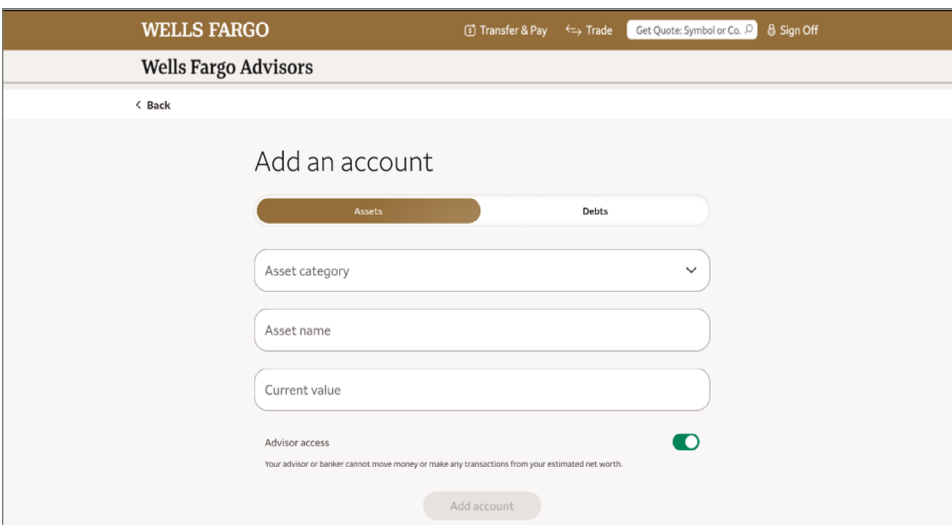
B. To link accounts from external financial institutions, select **Link accounts**.

1. If this is your first time linking an external account, when you select **Link accounts**, you'll navigate to a page that says "Wells Fargo uses Plaid to connect your account." Select **Continue**.
2. Select your bank (or other financial institution). If you do not see it, use the search bar to retrieve it.
3. Enter your credentials for the selected institution.
4. When the success message displays, select **Continue** to navigate back to Estimated Net Worth.
5. If you have additional financial companies you work with, simply repeat this process to link those accounts. You will complete steps 2, 3, and 4. However, you will not have to accept the "Terms of use" again.



C. To add any other asset or debt accounts you want included, you can choose the **Add Manually** link.

1. You'll be navigated to the Add an account page. To add an asset account, select the "Asset" tab.
2. Select **Asset category** from the dropdown, and enter the asset name and current value.
3. If you prefer not to share account details with your advisor, turn off the toggle switch for allow **Advisor access**.
4. Select **Add account**.
5. Repeat steps 1-3 to add Debts.



Other features

When you select the name of an individual account, you'll navigate to a page with account details. Here, you can see account name, masked account number, type of account, total value, last updated date and select details on the account you are viewing. You also can add or modify a "nickname" for external accounts. You can control whether your advisor can view an external account by choosing **Save**.

Note: Internal Wells Fargo & Company accounts cannot be hidden from your advisor.

Removing an external account

1. To remove an external account from your Estimated Net Worth Dashboard, select the **Disconnect account** [e.g., Your Current Bank] link on the Details page.
2. Once this link is selected, all accounts associated with that financial institution will be removed from the tool and you will be navigated back to the Dashboard page.

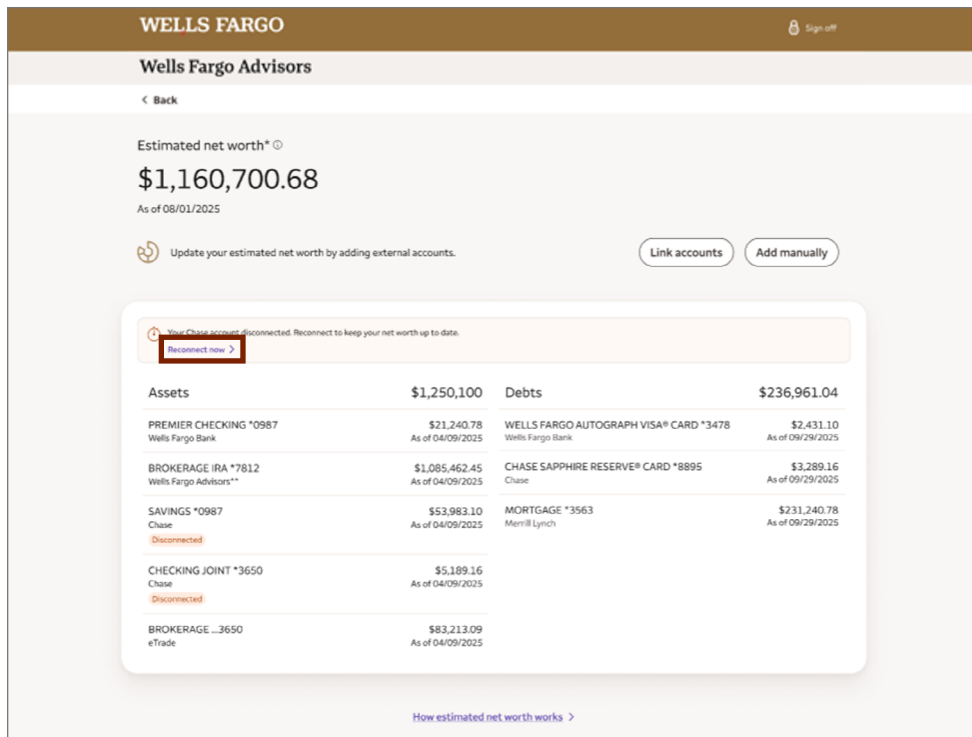
Note: Internal Wells Fargo & Company accounts cannot be deleted from Estimated Net Worth.

The screenshot displays the 'Wells Fargo Advisors' interface for a specific account. At the top, the Wells Fargo logo and a 'Sign off' button are visible. Below the header, the account name 'Wells Fargo Advisors' and a '< Back' link are shown. The main content area features the account name 'CHASE SAVINGS *0987' and a large balance of '\$53,983.10' as of '4/9/2025'. There is a text input field for 'Nickname account'. Below this, there are two toggle switches: 'Include in estimated net worth' and 'Advisor access', both of which are currently turned on. A note below the toggles states: 'Your advisor or banker cannot move money or make any transactions from your estimated net worth.' At the bottom, there are two buttons: 'Disconnect account' (highlighted with a red box) and 'Save'.

Reconnecting an account

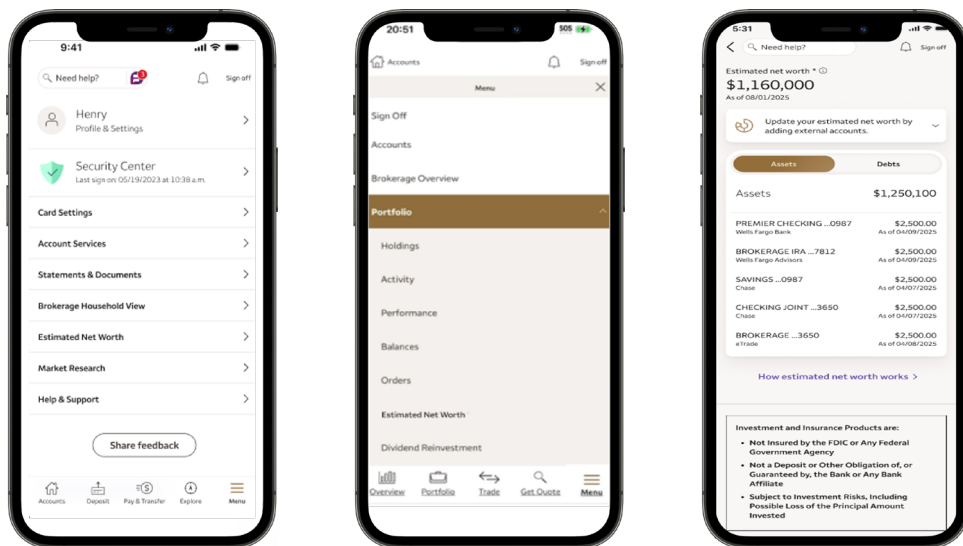
If you have lost connection to an external financial institution, follow these steps:

1. Select **Reconnect now** for any account associated with that financial institution on the Dashboard or on the Account Details page.
2. You'll be taken to a page where you can enter your current account credentials to reconnect all of your accounts for the institution and then navigate back to Estimated Net Worth.



Accessing Estimated Net Worth from the mobile app

1. Log in to your account from the mobile app.
2. From the **Main Menu** or the **Brokerage Portfolio Menu**, select **Estimated Net Worth**.



Screenshots are simulated. Features, functionality, and specifications appearing in those images may change without notice. Additional device availability may vary. Availability may be affected by your mobile carrier's coverage area. Your mobile carrier's message and data rates may apply.

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