WELLS FARGO Advisors

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:

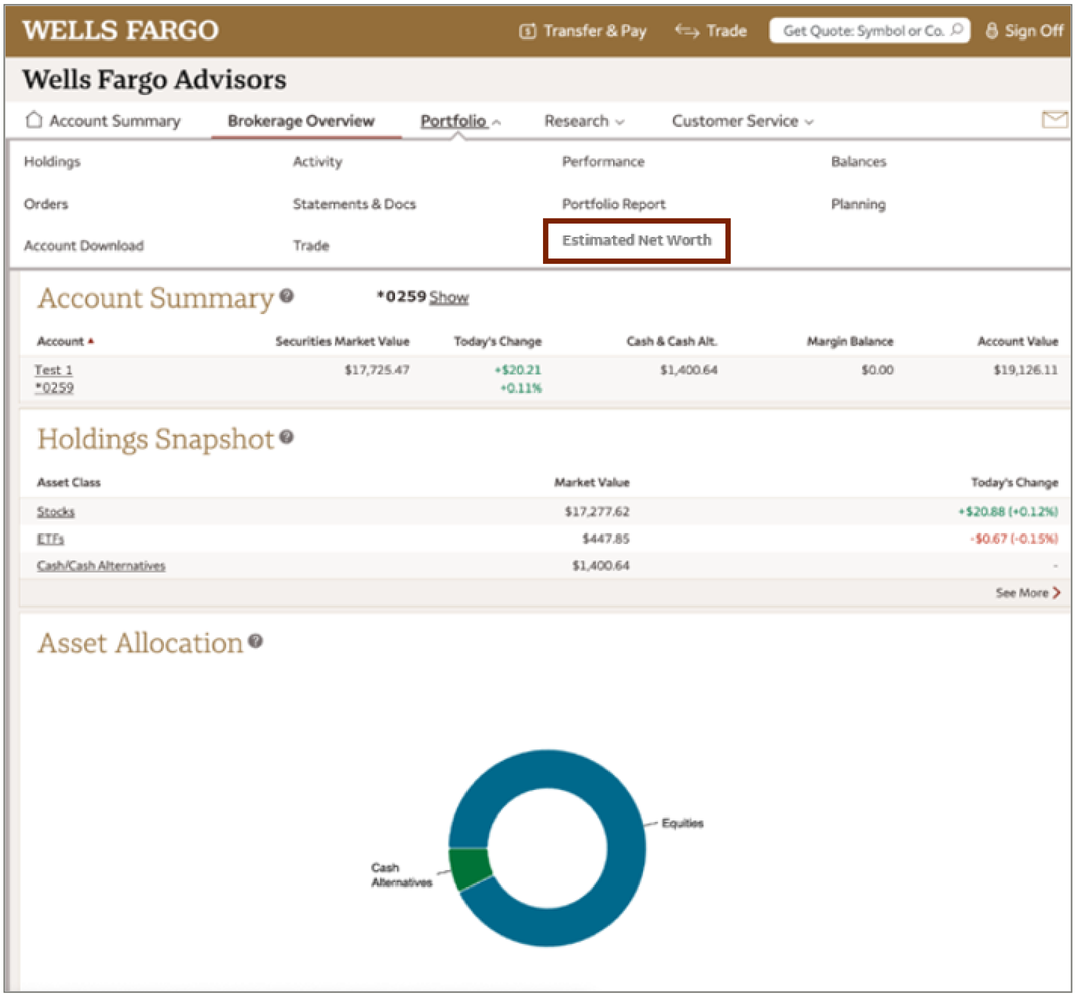
- Automatic display of all Wells Fargo account information
- Include non-Wells Fargo assets and liabilities in one view
- Ability to manually add any assets or liabilities not held at a financial institution
- Review updated account balances
- Allows your advisor the ability to view your external accounts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

Accessing Estimated Net Worth

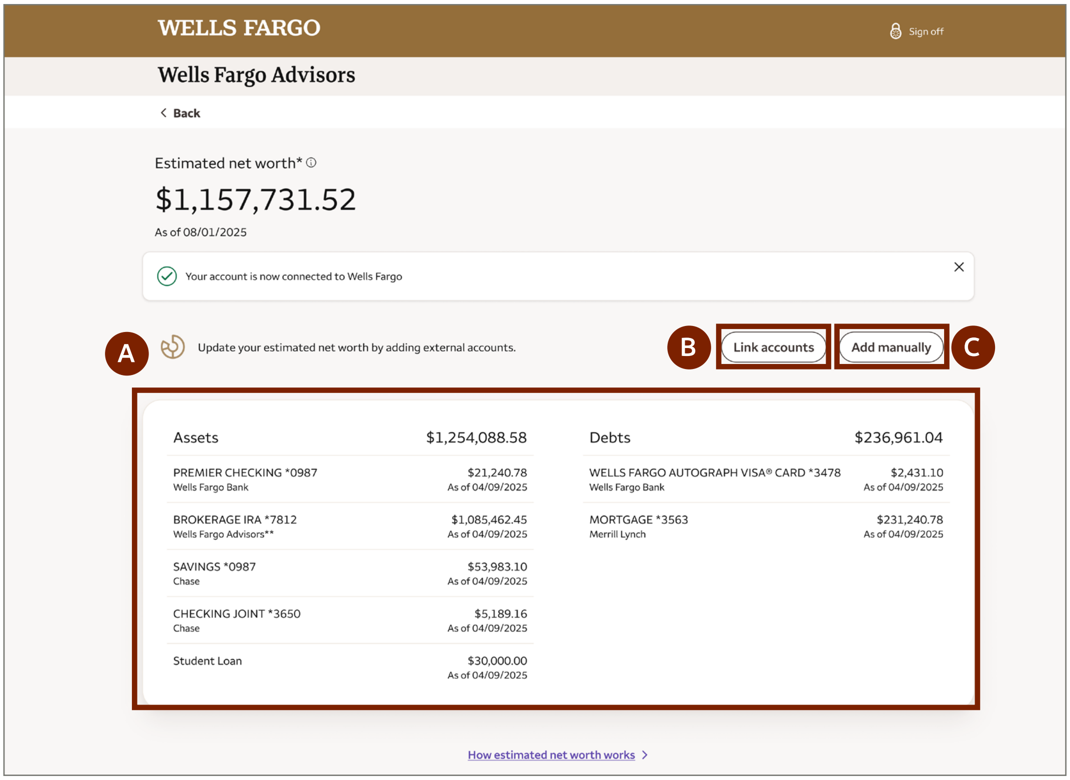
1. Log in to your account through WellsFargoAdvisors.com or wellsfargo.com. You may need to navigate to the online brokerage page.
2. Select the **Brokerage Overview** tab.
3. Select the **Estimated Net Worth** link under the Portfolio tab.



Dashboard view

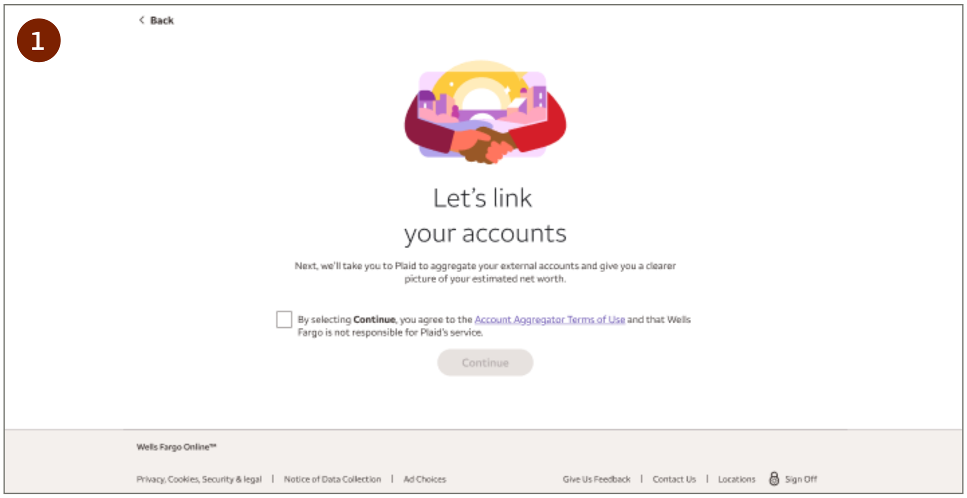
This page lists account information under Assets (cash, investments) and Debts (credit, loan) categories.

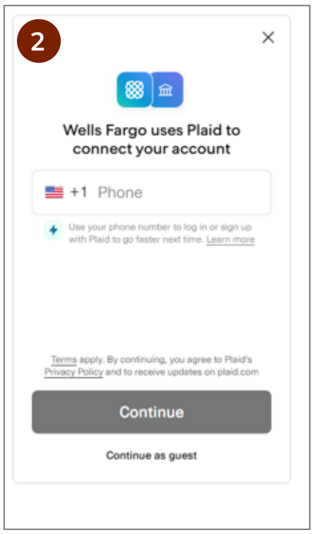
A. Select an individual account to view more details about it.

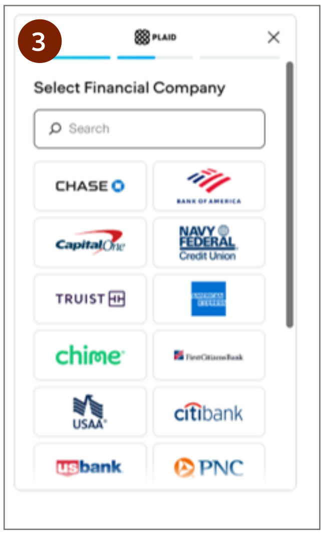


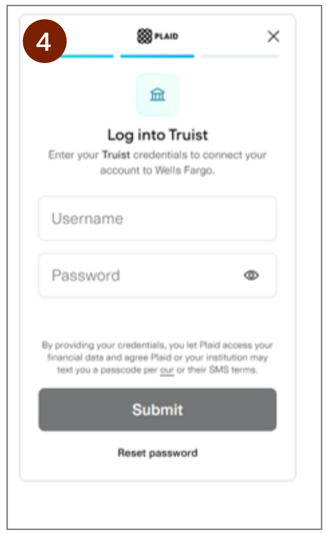
B. To link accounts from external financial institutions, select **Link accounts**.

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.



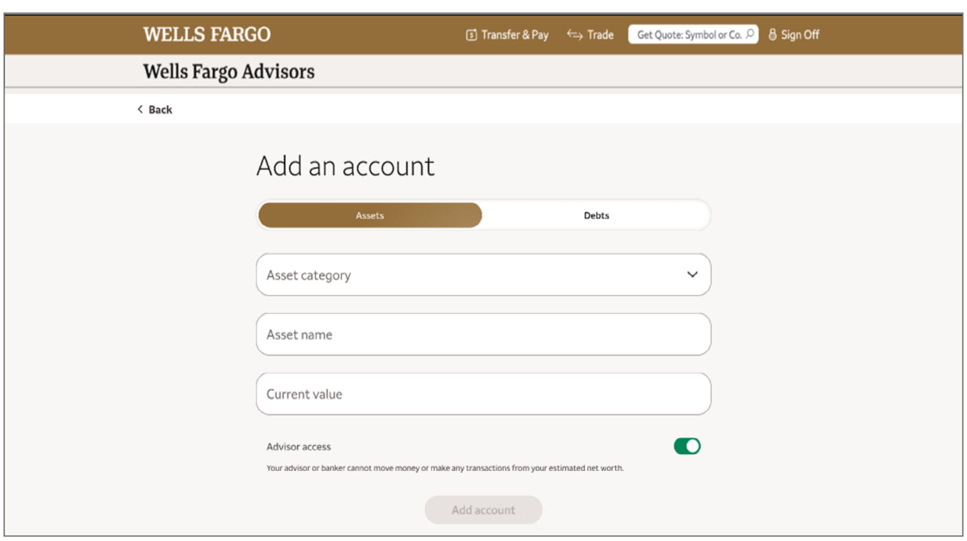






C. To add any other asset or debt accounts you want included, you can choose the **Add Manually** link.

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

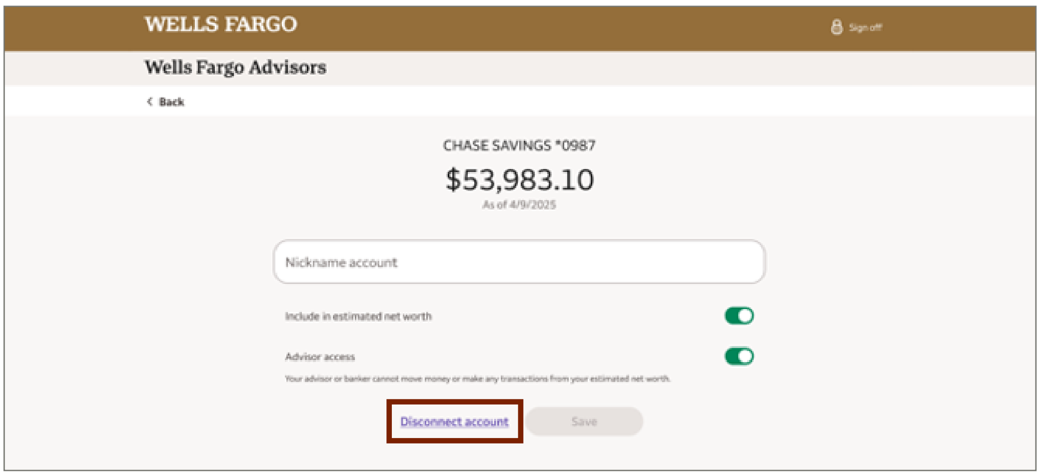
When you select the name of an individual account, you'll navigate to a page with account details. Here, you can see account name, masked account number, type of account, total value, last updated date and select details on the account you are viewing. You also can add or modify a "nickname" for external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

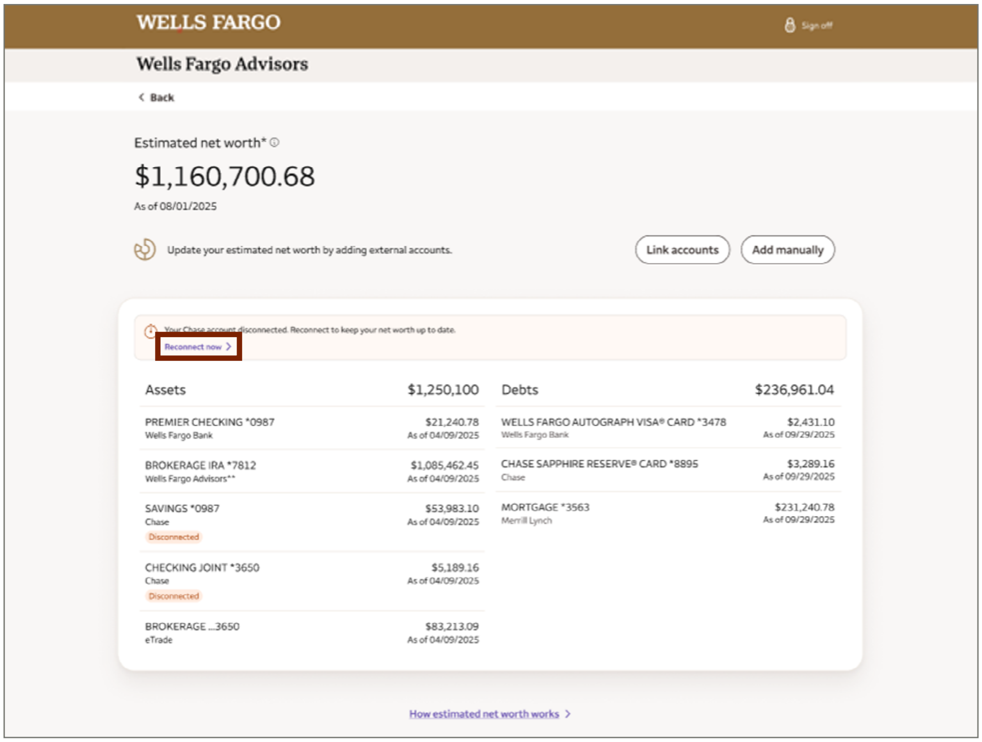
Note: Internal Wells Fargo & Company accounts cannot be deleted from Estimated Net Worth.



Reconnecting an account

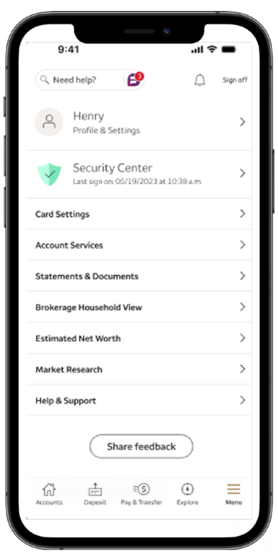
If you have lost connection to an external financial institution, follow these steps:

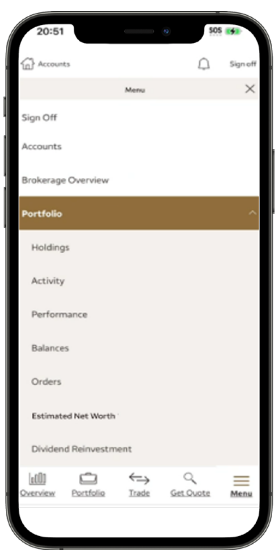
1. Select **Reconnect now** for any account associated with that financial institution on the Dashboard or on the Account Details page.
2. You'll be taken to a page where you can enter your current account credentials to reconnect all of your accounts for the institution and then navigate back to Estimated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

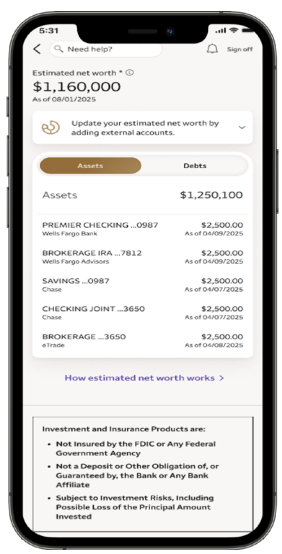


Accessing Estimated Net Worth from the mobile app

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







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