

MY MONEY MAP

Personal Financial Management

How to Add External Accounts, Assets or Liabilities to Net Worth

Step 1: Navigate to *PFM* and select the *View Net Worth* button on your dashboard; or choose the Net Worth tab in the toolbar.

The screenshot displays the My Money Map dashboard. The top navigation bar includes tabs for OVERVIEW, BUDGETS, CASHFLOW, GOALS, and NET WORTH. The NET WORTH tab is selected. The dashboard shows a current balance of \$1,000.00 and a 7-day projection of \$10,150.00. A list of transactions includes a test bill reminder alert for -\$100.00 on Nov 2, a paycheck for \$10,000.00 on Nov 3, and another test bill reminder alert for -\$100.00 on Nov 3. The Net Worth section for November 2021 shows a total net worth of \$213,084.33, which is down 83% from the last 3 months. Assets are \$290,078.11 (down 78% last 3 months) and debts are \$76,993.78 (up 79% last 3 months). A blue arrow points to the 'VIEW NET WORTH >' button at the bottom right of the Net Worth section.

Step 2: Click *Add Asset* or *Add Liability*.



The More You Know: The Net Worth tab allows you to track investments, wealth, and debt all in one place; while having access to monthly, quarterly, and annual trends. Your financial future is just as important as their day to day.

Step 3: Use the *Link Account* button to link an account held at an external financial institution.

The screenshot shows a financial dashboard with a dark blue navigation bar at the top containing the following tabs: OVERVIEW, BUDGETS, CASHFLOW, GOALS, and NET WORTH. A search icon and a refresh icon are also present in the top right. The main content area displays a list of assets with their respective values and a right-hand panel for linking accounts.

Asset Name	Value	Link Status
Total Assets	\$281,578.11	
401(k) Fidelity Investment	\$89,078.11	Linked Asset
Checking Personal CashEdge Test Bank (Agg) - Retail 2FA	\$328.90	Is this asset an account at a Bank or Credit Union? Link your account to easily keep these details updated.
One bank	\$10,000.00	LINK ACCOUNT ←
Wells Fargo2	\$1,000.00	Unlinked Asset
Investment	\$20,000.00	Name *
Trust Fund	\$10,000.00	Amount * \$
foreign asset	\$50,000.00	
Gold Collection	\$100,000.00	
Wine Collection	\$1,500.00	
Excluded Assets		
Primary Savings Savings	\$1,000.00	









Buttons: CANCEL, SAVE

Step 4: Click on, or search for, the financial institution your external asset or liability is held at.

OVERVIEW BUDGETS CASHFLOW GOALS NET WORTH

Add an account

Choose from the following financial institutions or search by name below.

Don't see your financial institution above? Search for it here.

Name _____

SEARCH

Still can't find what you're looking for?
[CONTACT SUPPORT FOR ASSISTANCE](#)

Step 5: If the asset/liability is not a linkable account, you can add the information manually using the *Name* and *Amount* fields.

The screenshot shows a financial dashboard with a navigation bar at the top containing: OVERVIEW, BUDGETS, CASHFLOW, GOALS, NET WORTH (selected), a search icon, and a refresh icon. Below the navigation bar, the 'Total Assets' are listed as \$281,578.11. A list of assets follows, including a 401(k) Fidelity Investment (\$89,078.11), a Checking Personal account at CashEdge Test Bank (\$328.90), and several other bank and investment accounts. A 'LINK ACCOUNT' button is visible next to the 'One bank' entry. Below the list, an 'Unlinked Asset' form is shown with the following fields: Name* (Vintage Wine Collection, highlighted with a blue arrow), Amount* (\$ 15,000.00), and buttons for CANCEL and SAVE. The 'Excluded Assets' section at the bottom includes a Primary Savings account (\$1,000.00).

Asset Name	Amount	Status
Total Assets	\$281,578.11	
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Checking Personal CashEdge Test Bank (Agg) - Retail 2FA	\$328.90	Linked Asset
One bank	\$10,000.00	Linked Asset
Wells Fargo2	\$1,000.00	Unlinked Asset
Investment	\$20,000.00	Unlinked Asset
Trust Fund	\$10,000.00	Unlinked Asset
foreign asset	\$50,000.00	Unlinked Asset
Gold Collection	\$100,000.00	Unlinked Asset
Wine Collection	\$1,500.00	Unlinked Asset
Excluded Assets		
Primary Savings Savings	\$1,000.00	Unlinked Asset

Step 6: Click Save.