

GEEZEO: HOW TO LINK OTHER ASSETS AND LIABILITIES

A Step-By-Step guide





Step 1: Expand the Insights/Geezeo menu and click "Net worth."

Step 2: Click the "Add Asset" button to add an account with deposits from another institution. Or click the "Add Liability" button to add a loan from another institution.



Step 3: Next, you will see all of the assets or liabilities held at Two Rivers Bank & Trust. Then, you will click "Link Account" and then click "Next."

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Step 4: Then, you will begin typing the first few letters of the institution name you wish to connect. Matches from a list should appear.

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Step 5: Next, you will be prompted to click "Next" to log-in to that institutions' site.



Step 6: Review the screen and click "Next."

	How to connect with Two Rivers Bank & Trust
1	By connecting with Two Rivers Bank & Trust, you'll also be giving access to Finicity, a Mastercard Company, the service Two Rivers Bank & Trus uses to collect data.
1	Review both companies' terms of use and privacy policies to learn how they'll use your data, or if they plan to share or sell it.
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	We'll never share your username or password.
8	% You can stop sharing at any time

Step 7: Review and click "Next."

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Step 8: Review and click "Connect my account(s)" to connect the accounts listed.

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Data you'll s	hare with them:			
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Step 9: Review and click "Submit."



Step 10: Finally, you will be directed back to your Net Worth page and the connected accounts will appear.

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Sally Checking Checking	\$9.90 >
Sav B 0004 🖌 Savings	\$40.23 >
Credit Cards	\$1,185.71
CREDIT CARD 🖌	\$1,185.71 >

How to Remove a Linked Account

Step 1: Click "Link Account" from the Net Worth screen.

Step 2: Click "Accept Terms and Conditions" disclosure.

Step 3: Next, on the Find Your Bank screen, you will see your bank connections listed.

Step 4: Click "Review."

Step 5: Click on the account you wish to remove.

Step 6: Then, click "Remove Bank."

Step 7: Finally, click "Remove Bank" a second time.

Step 8: The account has been removed.