You can view all of your assets and liabilities — even those held in accounts outside of BNY Mellon — within BNY Mellon Wealth Online.

My Wealth pulls in account information from your other financial institutions, giving you a fuller picture of your overall financial situation. It’s simple, convenient and secure.

– **Add a variety of accounts.** My Wealth supports a wide range of accounts from over 14,000 financial institutions: investments, retirement, banking annuity, insurance, mortgages, credit cards and lines of credit.

– **Stay focused on your goals.** Being able to view all your assets and liabilities together in one place can allow you to address issues and seize opportunities you might otherwise have overlooked.

– **Feel secure.** External account data cannot be altered, and the login information you provide for these accounts is encrypted at all times.

**Get a More Complete Picture of Your Wealth**

**My Wealth at BNY Mellon Wealth Online**

How to Enroll in My Wealth

1. Before beginning, make sure you have the usernames and passwords for the institutions you wish to add to My Wealth.

2. Log in to BNY Mellon Wealth Online.

3. Look for the “Link Your External Accounts” message.

4. Select the external institutions you wish to add.

5. Enter your usernames and passwords and follow the on-screen instructions.

**Frequently Asked Questions**

**How often will my external account information be updated?**

Your external account information will be automatically updated once every night.

**Can I manually add accounts?**

Yes. In addition to linking institutions, My Wealth enables you to manually add accounts as well as other assets and liabilities, including real estate, cars, boats, artwork and collectibles, or alternative investments.

**Can I modify or execute transactions in my external accounts from within BNY Mellon Wealth Online?**

No. My Wealth provides read-only access to your external account information. You cannot make changes or take action in those accounts.

**Who will be able to view my external account information?**

The information contained in My Wealth can be viewed by your Wealth Manager or, if you grant them access, your personal financial advisor. However, they cannot change this information or your My Wealth settings (e.g., removing linked accounts).
Select “My Wealth” to view a complete breakdown of your BNY Mellon and outside accounts all in one place.

<table>
<thead>
<tr>
<th>My Wealth</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total Value</strong></td>
</tr>
<tr>
<td>$15,943,913.64</td>
</tr>
</tbody>
</table>

Last updated on Aug 27, 2021

### Institution Overview

**Overview:**
- **Total Value:** $22,495,131.22
- **Linked Institutions:** 6
- **Needs Attention:** 0

**Last updated on:** Apr 4, 2016

### BNY Mellon
- **Total Balance:** $8,900,310.24
- **Accounts:** 1
- **Connection Status:** Automatic

### Bank of America
- **Total Balance:** $1,763,803.60
- **Linked Accounts:** 2
- **Connection Status:** Good

**Last updated on:** Apr 6, 2019

### Fidelity
- **Total Balance:** $10,511,043.28
- **Linked Accounts:** 1
- **Connection Status:** Good

**Last updated on:** Apr 6, 2019

Add, remove and manage your account preferences on the Institution Overview page.

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